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Follow-up to the World Summit for Social Development and the twenty-fourth special session of the General Assembly: review of the relevant United Nations plans and programmes of action pertaining to the situation of social groups: modalities for review and appraisal of the Madrid International Plan of Action on Ageing

Modalities for the review and appraisal of the Madrid International Plan of Action on Ageing

Report of the Secretary-General

Summary

The present report reviews recent progress in defining the modalities for the review and appraisal of the Madrid International Plan of Action on Ageing. It suggests, for the consideration of the Commission for Social Development, possible arrangements for the first cycle of the review and appraisal at the national, regional and international levels.

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I. Introduction

1. In the Madrid International Plan of Action on Ageing, adopted by the Second World Assembly on Ageing in 2002, the World Assembly noted that systematic review of its implementation by Member States is essential for achieving success in improving the quality of life of older persons and requested that the modalities of review and appraisal should be decided as soon as possible. The General Assembly, in its resolution 57/167, invited the Commission for Social Development to consider those modalities at its forty-first session in 2003. Following the recommendations of the Commission for Social Development, the Economic and Social Council, in its resolution 2003/14, invited Governments, the United Nations system and civil society to participate in a "bottom-up" approach to the review and appraisal of the Plan, through, inter alia, data collection and the sharing of ideas and best practices.

2. In its resolution 42/1 on the modalities for review and appraisal of the Madrid Plan of Action, the Commission for Social Development, inter alia, encouraged Member States to establish or strengthen, as appropriate, national coordinating bodies or mechanisms to facilitate the implementation and dissemination of information about the Madrid Plan of Action, including its review and appraisal. The Commission also encouraged Member States to include both ageing-specific policies and ageing-mainstreaming efforts in their review and appraisal of the Madrid Plan of Action and in their national strategies, bearing in mind the importance of mainstreaming the issue of ageing into global agendas.

3. In the same resolution, the Commission decided to undertake the review and appraisal of the Madrid Plan of Action every five years and requested the Secretary-General to propose guidelines for the review and appraisal process, taking into account the views of Member States, civil society and the private sector, including a proposal for a specific theme emanating from the Madrid Plan of Action for the first review and appraisal cycle.

4. The Secretariat sent a note verbale, dated 14 June 2004, to the permanent missions of all Member and observer States to draw attention to Commission for Social Development resolution 42/1 and to request information regarding actions taken with regard to national coordinating bodies or mechanisms and to efforts to develop ageing-specific policies or to mainstream ageing in national strategies. In the note verbale, the Secretariat also sought the observations and suggestions of Member States regarding the guidelines for the review and appraisal process and proposals for a specific theme for the first review and appraisal cycle. Responses to the note verbale were received from twenty-seven Member States.

5. In its resolution 59/150, the General Assembly requested the Secretary-General to present his proposals for conducting the review and appraisal exercise at the regional and global levels to the Commission for Social Development at its forty-fourth session. The current report is prepared in compliance with the request of the General Assembly and is based on the views of Member States organizations, programmes and specialized agencies of the United Nations system and major international non-governmental organizations.

6. In addition, the Division for Social Policy and Development of the Department of Economic and Social Affairs of the Secretariat organized, together with the Economic Analysis Division of the United Nations Economic Commission for Europe, an interregional consultation on the review and appraisal of the Madrid Plan

of Action, which was held at the Palais des Nations of the United Nations Office at Geneva from 26 to 28 September 2005. Officials with responsibility for issues of ageing from each of the five regional commissions, officials from programmes and specialized agencies of the United Nations system and regional representatives participated in the consultation. They discussed ways and means to promote the bottom-up approach and contributed to the elaboration of regional modalities of the review and appraisal of the Madrid Plan of Action, including the calendar, content and format of the regional and global review and appraisal.

II. Review and appraisal of the Madrid Plan of Action at different levels

A. Bottom-up participatory approach

7. The bottom-up approach and the participation and flexibility it affords are the principal characteristics of the review and appraisal of the Madrid Plan of Action, which were elaborated by the Commission for Social Development. The bottom-up approach brings the monitoring, review and appraisal processes as close as possible to the national and even local level, where the majority of implementation efforts are taking place. The approach reflects and promotes a major tenet of the Madrid Plan of Action, which is to ensure that older persons are viewed as active members of their societies and that their participation in decision-making is facilitated. The participatory nature of the review and appraisal envisages the involvement of all major stakeholders in the process, thus promoting opportunities, in particular those for older persons, to realize their potential to participate fully in all aspects of life and, most importantly, in actions that are designed to specifically influence their well-being. The involvement of older persons in their communities is crucial for the bottom-up participatory assessment of governmental policy and programmes on ageing.

8. It is equally important that the review and appraisal be a flexible exercise, allowing for national and local experience and expertise to be utilized and relevant good practices identified and shared. In this context, pre-existing programmes and projects — both within and outside the issue of ageing — could be analysed in order to reveal and evaluate their participatory components. When planning how and where to implement bottom-up participatory approaches, Governments should define what constitutes participation and where it takes place. There are different degrees of participation, from merely being informed of what is happening to the actual empowerment of stakeholders through involvement in all stages of an activity. The methodology is important and it is vital to identify groups and organizations that are familiar with participatory approaches. Local and national research and university centres, and non-governmental and community-based organizations could be invited to participate and share their experience in participatory monitoring and assessment. The Madrid Plan of Action emphasized the valuable role of independent, impartial monitoring of progress in its implementation, which could be conducted by autonomous institutions. Important lessons could also be learned from participatory projects and programmes of the United Nations system and non-governmental organizations. The experience could be in areas besides ageing, including in the elaboration of participatory budgets or in

conducting participatory research in numerous areas of social development. It is therefore important that Governments take a broader look.

9. The bottom-up participatory approach does not aim to replace all other methods of monitoring, review and appraisal. Instead, it calls for their supplementation through a wider use of qualitative methods. While concrete methodology may vary, qualitative and participatory content should be strengthened and more fully utilized. In addition, the quantitative monitoring of social situations, such as through censuses, surveys and civil registration, can play a very important role by helping to identify local and national priorities on ageing for more targeted participatory inquiry.

10. The bottom-up participatory approach has advantages and limitations. Some of its major advantages include gathering information directly from older persons, the primary stakeholders in the implementation of the Madrid Plan of Action, discovering emerging issues quickly and giving regular feedback to stakeholders as a basis for making necessary adjustments to existing policies and programmes. The limitations of participatory assessment include the complexity of the process, the difficulties in assuring the continuing availability of core stakeholders originating from the same community, and the availability of sufficient expertise to analyse and process information. Other possible challenges include how to assure that the bottom-up review and appraisal is representative and its results are informative and valid for policy adjustment. Weighing the pros and cons of the bottom-up participatory approach is a daunting task. Meanwhile, it is the approach that directly responds to the participatory thrust of the Madrid Plan of Action, which promotes participation of older persons in decision-making processes at all levels.

11. The process of participatory review and appraisal is not intended to produce a mere checklist of whether or not Governments have implemented the Madrid Plan of Action. It should be a means for Governments and citizens to engage in dialogue in order to achieve a better understanding of the situation and needs of older persons and to promote implementation of the Madrid Plan of Action in areas that are truly important to people. The process should help Governments to assess policies and programmes and to share good experiences. It should not be simply a one-time activity for reporting to national authorities or international bodies. The bottom-up participatory approach should ideally represent an ongoing process of engagement and participation that will be incorporated into the implementation of the Madrid Plan of Action.

12. The bottom-up approach envisages the involvement of older persons as primary, or core, stakeholders and major players in conducting the review and appraisal. Paradoxically, for the bottom-up approach to be fully operational, it is essential for it to have a top-down component, which would support the participatory process of review and appraisal through organizational, promotional and financial measures. The process needs a catalyst and a facilitator. Government should be seen as the principal catalyst and end-user of policy-relevant information, involving, as necessary, facilitators with sufficient experience in conducting participatory research. In this regard, it is necessary to have an established national mechanism on ageing, which would have overall responsibility for the implementation, monitoring and appraisal of national action on ageing. The agendas of national implementation of the Madrid Plan of Action, on the one hand, and its review and appraisal, on the other, are compatible and mutually reinforcing. Success

of the national implementation of the Madrid Plan of Action depends to a large extent on the existence of a clear-cut national strategy to mainstream ageing issues into policy processes at the national level and the ability of various national ministries and institutions to coordinate actions to this effect, establish pertinent partnerships and secure funding, first of all budget allocations, to keep the focus on ageing. Based on the information that has been made available to the Secretariat, 25 Governments have established their national mechanisms on ageing. In some countries, organizations of older persons are represented in these mechanisms. **In this connection, the Commission may wish to request those Member States that have not done so to establish their national mechanisms for the implementation of the Madrid Plan of Action at the national level and inform the United Nations Secretariat accordingly, including by providing the contact details of the national mechanisms, in order to facilitate international cooperation and the exchange of information and good practices.**

13. Among its many functions, the national mechanism on ageing, whether a council, committee or similar body, will have important responsibilities for the review and appraisal exercise. Working with the relevant ministry or office, this body should define the scope of its activities and responsibilities, especially what to review and appraise. That involves identifying principal national priorities on ageing, relevant policies and programmes that were adopted vis-à-vis the recommendations of the Madrid Plan of Action, goals and targets established and resources allocated for their accomplishment by each stakeholder. Available statistical data could allow for a preliminary assessment of the local and national ageing situation and the identification of areas for more specific participatory inquiries. Another important step is to find out what participatory experience and traditional practices of participatory dialogue are available in the country and decide how they could be adapted to the specific objectives of the review and appraisal exercise. A major partner with experience in participatory research — a non-governmental organization, academia or a consultant group — could be invited to facilitate, but not direct, the participatory exercise, including gathering information, analysing it and presenting it in a policy-relevant format.

14. Based on the information that was made available to the Secretariat, several countries have undertaken measures to develop procedures for monitoring national activities towards the implementation of the Madrid Plan of Action. Often, these include regular monthly or quarterly meetings of the Government-led national coordinating entity in order to promote and facilitate review and appraisal through working with contributing agencies, including monitoring and coordinating the development and publication of periodic evaluation reports, engaging contributing agencies in the identification and dissemination of positive and replicable practices, promoting and facilitating the monitoring process through education and training of major stakeholders, including older persons, and reaching out to involve various segments of civil society in review and appraisal exercises.

B. Support for national action

15. The organizations, programmes and specialized agencies of the United Nations system can offer their expertise and practical experience in support of national efforts to implement, review and appraise the Madrid Plan of Action. The Department of Economic and Social Affairs prepared a framework for the

monitoring, review and appraisal of the Madrid Plan of Action that provides Member States with substantive background for the bottom-up participatory approach, describes and compares qualitative and quantitative methods of review and appraisal and proposes in its annex a set of indicators to assess progress made regarding the implementation of the Madrid Plan of Action. The framework and the chart of indicators are available online (www.un.org/esa/socdev/ageing). In addition, and in cooperation with the regional commissions and other interested organizations, the Department of Economic and Social Affairs is currently developing practical guidelines for the review and appraisal of the Madrid Plan of Action at the local and national levels, explaining the content and suggesting a methodology for the bottom-up participatory approach. The guidelines are meant to help national Governments with all stages of participatory and bottom-up processes of review and appraisal. Support for national action will take the form of a number of activities contemplated by the Department and the regional commissions. Provision of support is, for the most part, subject to the availability of extrabudgetary resources. In order to better assist Member States in their efforts to review and appraise implementation of the Madrid Plan of Action, including through advisory missions at the request of Governments, a funding proposal for the provision of technical cooperation by the Department of Economic and Social Affairs and other entities of the United Nations system organizations, including the regional commissions, will be prepared.

16. The Statistics Division of the Department of Economic and Social Affairs is updating the Principles and Recommendations for Population and Housing Censuses in preparation for the 2010 World Programme on Population and Housing Censuses. The updating process will include a review of the age and sex categories for the disaggregation of data on a wide range of demographic and social characteristics of the population. It is envisaged that, for many of the topics, given the increased concerns about population ageing, the upper age cut-off for tabulating the data will be raised to 100 years plus. Through a series of regional and global meetings in preparation for the 2010 round of population and housing censuses, the Division is planning to further emphasize the need to provide national numerical frameworks for review and appraisal of the Madrid Plan of Action.

17. The Economic and Social Commission for Asia and the Pacific has conducted two national workshops, in China and Sri Lanka, to test a bottom-up participatory approach for reviewing the impact of ageing-related policies in the field. In preparation for the workshops, the Commission developed a training manual on the appraisal modality, in which a comprehensive matrix of indicators was included. The proposed matrix was endorsed by participants at the regional seminar on follow-up to the Shanghai Implementation Strategy, which was conducted by the Commission in Macao, China, in October 2004, and five countries expressed an interest in utilizing the matrix for review and appraisal of the implementation of the Madrid Plan of Action and the Shanghai Implementation Strategy. At the request of the Government of China, the secretariat of the Commission organized a national follow-up expert seminar on ageing-related data collection in January 2005 to harmonize the national "indicator matrix" for the Madrid Plan of Action.

18. The Economic Commission for Latin America and the Caribbean has followed a subregional approach in its implementation and monitoring efforts by organizing expert seminars for countries in Central America (El Salvador, November 2004), the Caribbean (Trinidad and Tobago, November 2004) and South America (Buenos

Aires, November 2005). The Commission is also providing technical support to five countries of the Central American and Caribbean subregions (the Dominican Republic, El Salvador, Guatemala, Nicaragua and Panama) in the elaboration of national policies and programmes on ageing, taking into account the recommendations of the Madrid Plan of Action and encouraging the development of a participatory approach for policy and programmes.

19. The Economic and Social Commission for Western Asia works to promote awareness-raising and the participation of older persons and assists Member States, at their request, to develop and implement national action plans, including for review and appraisal. The Commission has received two requests for technical assistance in formulating national action plans on ageing.

20. The United Nations Population Fund (UNFPA) conducts participatory exercises at the country level for needs assessment and programme development. Such exercises are carried out by multidisciplinary teams that include representatives from the UNFPA office, Governments, non-governmental organizations and various stakeholders. In India, UNFPA conducted a 32-district needs assessment and plan of action in the Integrated Population and Development Project involving the Government, non-governmental organizations, health service providers and locally elected bodies as part of the process leading to the formulation of the sixth Government of India/UNFPA Country Programme 2003-2007. Similar exercises are carried out in other countries to identify a range of priority programme areas pertaining to adolescents, older persons, women's empowerment and emergency situations. The UNFPA regional office for Latin America and the Caribbean, through its country support team and with the collaboration of the Economic Commission for Latin America and the Caribbean, supported research on the participatory mechanisms for the design and implementation of laws, policies and programmes in Argentina, Brazil, Chile and Colombia. UNFPA will make available its expertise in conducting participatory research in various areas of population activities and continue to support the training of policymakers and programme planners. It will also support research activities, advocacy efforts to renew interest in population ageing, and ageing initiatives, including the work of non-governmental organizations in this area, and capacity-building. UNFPA is currently in the process of finalizing its guidance note on population ageing, which will encourage country offices to advocate for the mainstreaming of population ageing into national development frameworks and poverty reduction strategies, encourage the collection of country-level data disaggregated by age and sex and support the implementation of the Madrid Plan of Action and participation in its review and appraisal process.

21. The International Labour Organization (ILO) will contribute to the national monitoring, review and appraisal exercises by sharing its extensive knowledge base on employment and social protection statistics and qualitative information, such as on the application of labour standards. ILO will also share its long-standing experience in bringing together Governments and social partners — representatives of workers and employers — in order to reach constructive and balanced decisions.

22. Through various projects, the World Health Organization (WHO) is collecting experience in qualitative research methodologies on selected priority issues identified in the Madrid Plan of Action, particularly those related to primary health care and the provision of integrated health and social services for older people.

Subject to the availability of additional resources, WHO could provide, through its system of regional advisers on ageing and WHO country offices, technical assistance to interested Governments in reviewing the implementation of the Madrid Plan of Action on health-related issues.

23. Interesting and useful lessons could also be learned from non-governmental organizations in the area of ageing. For instance, HelpAge International offers numerous examples of participatory initiatives, including those with a monitoring component. An Older Citizens Monitoring Project is being implemented in Bangladesh, Bolivia, Jamaica, Kenya and the United Republic of Tanzania. The project aims at engaging older persons with relevant agencies, supporting local and national advocacy with and by older people, developing locally relevant indicators and benchmarks and promoting dialogue with local and international development agencies. Member organizations of the International Federation on Ageing are involved in and employ a wide range of participatory methodologies at local, national and international levels in their advocacy work and evaluation, planning and developing future programmes. The methods used include in-depth face-to-face interviews, participatory appraisals, exploring visions of the community followed by scenario planning, community audits, senior mentorship and large-scale national consultations in conjunction with Governments, industry and other national non-governmental organizations.

24. There remains a need for more and better communication among various entities within the United Nations Secretariat, the regional commissions, headquarters offices of United Nations programmes and specialized agencies and United Nations country teams. An important objective is to promote interaction within and between regions and subregions so that experiences, lessons and good practices can be shared. Consideration should be given to how the United Nations system can become more proactive in working together and with Governments and non-governmental organizations. The Department of Economic and Social Affairs programme on ageing could work as a clearing house of information and promote the sharing of experiences throughout the United Nations system and among Governments and non-governmental organizations. **The Commission may wish to ask the Secretariat to work with the United Nations system and other interested parties to coordinate efforts in identifying support that could be provided to Governments, upon their request, to undertake a participatory review and appraisal of the implementation of the Madrid Plan of Action.**

C. Regional-level review and appraisal

25. The bottom-up approach envisages that the findings of national reviews and appraisals will be consolidated at the regional level through the United Nations regional commissions. This exercise will be undertaken in connection with the review and appraisal of regional implementation strategies for the Madrid Plan of Action. Currently, such strategies are available and being implemented in the Economic Commission for Europe, the Economic and Social Commission for Asia and the Pacific and the Economic Commission for Latin America and the Caribbean regions. While the Economic Commission for Africa has not elaborated a regional implementation strategy, the African Union Policy Framework and Plan of Action on Ageing was adopted by African Union heads of State and Government in Durban, South Africa, in July 2002. Similarly, in the Western Asia region, the Arab

Plan of Action on Ageing to the Year 2012 was adopted during the Arab preparatory meeting for the Second World Assembly on Ageing, which was held in Beirut in February 2002. Both the Economic Commission for Africa and the Economic and Social Commission for Western Asia regional documents are conceptually and operationally closely related to the Madrid Plan of Action. At the same time, all regional policy documents on ageing differ in terms of priorities for action.

26. Because of the existence of regional implementation strategies or analogous regional documents on ageing in all the regions and because countries in the same region may share similar situations and priorities, it is considered most relevant for countries to share information, experiences and good practices, promote South-South cooperation and draw conclusions and set priorities for future cooperation and technical assistance primarily at regional-level review and appraisal exercises organized by the regional commissions. It is expected that the regional commissions will elaborate concrete plans for conducting the review and appraisal exercises. The format of the regional reviews and appraisals may vary from region to region and would include various events such as conferences, workshops, meetings of experts and seminars.

27. The Economic Commission for Africa, as coordinator of United Nations activities on ageing in the region, plans to apply its experience in review and appraisal of the implementation of the major international policy frameworks towards monitoring the implementation of the Madrid Plan of Action. The Commission envisages the convening of working groups of experts and the organization of a conference of major stakeholders as appropriate formats for review and appraisal. The working groups may be composed of multisectoral and multidisciplinary experts and the conference of stakeholders may include international stakeholders and ministers with responsibility for economic development and finance, social welfare, gender and health. The Commission would also look forward to carrying out a survey of Member States that would focus on identifying best practices in policy development on ageing in the region.

28. Following the signing of a memorandum of understanding between the Economic Commission for Europe and the Government of Austria, the Vienna-based European Centre for Social Welfare Policy and Research will assist the secretariat of the Commission in the implementation and monitoring of the regional strategy. The primary task of the European Centre is to help clarify the modalities and procedures for regional monitoring, review and appraisal. This includes developing indicators linked to the commitments of the Commission's ECE implementation strategy. The Commission has received three requests from Member States to conduct training workshops and assist in national capacity-building on review and appraisal. The Commission is considering publishing a report that would be based on demographic data and information from national reports on ageing, including participatory findings, as available.

29. The Economic Commission for Latin America and the Caribbean sees the regional review and appraisal as a series of different activities culminating at a regional event during its annual session. Activities under consideration include organizing subregional seminars and meetings of experts, conducting studies on the interrelationship between ageing, family and public policy, designing future scenarios for ageing societies, including impact assessment of policy interventions,

and updating a data bank for regular demographic monitoring of population ageing in Latin America and the Caribbean.

30. Latin American and Caribbean countries will meet in the framework of the Ad Hoc Committee on Population and Development during the periodic session of the Economic Commission for Latin America and the Caribbean, to be held in Montevideo in March 2006, and will discuss the follow-up activities of the regional process of implementation and review and appraisal of the Madrid Plan of Action, including the convening of the regional conference of the five-year review of the implementation of the Madrid Plan of Action.

31. During the Economic and Social Commission for Asia and the Pacific seminar in Macao, China, in 2004, several participants expressed their strong support for a high-level event as the region's input to the global review and appraisal, as reflected in the recommendations of the seminar. In addition to the high-level segment, a working-level segment could explore one of the issues of regional priority, such as the funding requirements for the care of older persons. The Commission has indicated that the Government of Macao has offered to host a regional review conference in September 2006.

32. The Economic and Social Commission for Western Asia foresees organizing a regional meeting to consider national review and appraisal reports. A political declaration on ageing and a comprehensive report could be the results of such a meeting. The ability to convene such a meeting depends on the availability of additional resources. An alternative would be to address a specialized questionnaire regarding national review and appraisal to Governments and non-governmental organizations.

33. It must be reiterated that the provision of support for national action for review and appraisal and for the holding of regional events to conclude the regional segment of the process requires substantial financial resources. Those resources are not currently available in the regular budgets of the regional commissions and would most likely be sought from extrabudgetary contributions from interested Governments. **The Commission may wish to request the regional commissions to identify appropriate modalities for conducting the regional review and appraisal and call upon interested Governments to offer support and assistance, including financial contributions, to support national action and the convening of regional review and appraisal activities and events during 2006 and 2007.**

III. Proposed calendar for the first cycle of the review and appraisal

34. The participatory review and appraisal should be viewed as an ongoing process that will occasionally report to regional and global levels. While the review and appraisal exercise is not time-bound, it is important to set the target year for consolidating the findings at the global level. The target year of 2007 is important, as it marks five years since the Second World Assembly on Ageing was convened in Madrid and, since there has not been a regional or a global review on ageing since 1997, it would also close a 10-year gap in assessing the situation of the world's older persons and international action on ageing. At the same time, however, a great

deal of preparatory work remains to be done, at all levels, to make the bottom-up participatory review and appraisal meaningful. Therefore, a series of activities is proposed in the calendar that follows, highlighted by a global review of the world ageing situation during the forty-fifth session of the Commission for Social Development in 2007 and a global review and appraisal of the implementation of the Madrid Plan of Action during the forty-sixth session of the Commission in 2008. The tentative calendar for the first cycle of the global review and appraisal of the Madrid Plan of Action is proposed as follows:

2006

(a) The Commission for Social Development decides on the timing, modalities and theme for the first cycle of the review and appraisal;

(b) Member States receive practical guidelines for the review and appraisal of the Madrid Plan of Action prepared by the Department of Economic and Social Affairs in consultation with the regional commissions and programmes and agencies of the United Nations system. As a first step, Member States will indicate their priorities for review and appraisal and undertake an "instrumental" assessment, including identifying laws and implementing regulations, institutions, policies and programmes introduced or altered since 2002 in response to the Madrid Plan of Action. Countries will also recall national priorities and review the national ageing situation. As a result, each country will have identified for itself specific areas for in-depth participatory inquiries using the bottom-up approach. They would present this information to the Commission for Social Development in 2007;

(c) The Department of Economic and Social Affairs and the United Nations system will work jointly to promote awareness of the bottom-up approach and familiarity with the guidelines, to assist countries in beginning the process;

(d) Regional commissions, at their governing bodies, will undertake an initial regional assessment of the ageing situation based on country reports on the accomplishments of national plans of action on ageing and submit their findings to the Department of Economic and Social Affairs for inclusion in a report of the Secretary-General to the Commission for Social Development;

2007

(a) The Commission for Social Development will mark the fifth anniversary of the Second World Assembly on Ageing. The Secretary-General will submit to the Commission a report on major developments in the area of ageing since the Second World Assembly (report on the world ageing situation), which could include short regional contributions (regional ageing situations) by the regional commissions. Member States will inform the Commission about the actions they have taken since the Second World Assembly to implement the Madrid Plan of Action (for example, new laws, policies and programmes, the establishment of coordinating mechanisms and information campaigns) and exchange information on which area each country will determine for itself to evaluate using a bottom-up participatory approach;

(b) National and regional processes of review and appraisal will begin. Countries will review and appraise the national policies and strategies that they identified. Information on the initial experience and good practices in organizing

and conducting bottom-up participatory evaluation at the local and national levels will also be collected, analysed and presented to the regional commissions;

(c) Upon request, the regional commissions, in cooperation with other entities, will assist countries in conducting their national review and appraisals and encourage participatory approaches to the process;

(d) Regional commissions will convene regional conferences (pending the availability of sufficient resources) to consider the findings of national reviews, share experiences and good practices and identify priorities for future action. The commissions will submit the conclusions of the meetings and individual national reports to the Commission for Social Development in 2008;

2008

The Commission for Social Development, at its forty-sixth session in February 2008, will conduct the global segment of the first cycle of the review and appraisal of the Madrid Plan of Action. The modalities of this segment could include a series of plenary meetings or deliberations of a series of round tables. An outcome document could include the conclusions of the first review and appraisal exercise along with the identification of prevalent and emerging issues and related policy options. A series of parallel events, including panels, workshops and seminars organized by all major stakeholders will be conducted, including the presentation of findings of independent monitoring projects.

35. **The Commission may wish to endorse the proposed calendar for the first cycle of review and appraisal of the Madrid Plan of Action. It may also wish to invite Governments to undertake an initial identification of actions they have taken since the Second World Assembly on Ageing, with the aim of presenting this information to the Commission at its forty-fifth session in 2007, so that each country may establish for itself the action or activity it intends to review utilizing a bottom-up participatory approach. The Commission may also wish to request the Secretary-General to submit to the Commission at its forty-fifth session in 2007, a report on major developments in the area of ageing since the Second World Assembly (the report on the world ageing situation), which could include short regional contributions (regional ageing situations) by the regional commissions.**

36 The global segment of the first cycle of the review and appraisal at the forty-sixth session of the Commission would provide opportunities for assessing progress in the implementation of the Madrid Plan of Action at the national and regional levels, identifying achievements and obstacles in the implementation process, exchanging experiences and good practices, analysing international cooperation on ageing and selecting priorities for the next cycle of the implementation process. Participants would include representatives of Member States and representatives of all other major stakeholders. **The Commission may wish to recommend that the format of the concluding event include, along with a plenary debate, a series of panel discussions and parallel events related to the theme of the first review and appraisal cycle.**

37. Thus the review and appraisal of the Madrid Plan of Action would consist of a spectrum of events at the local, national, regional and international levels and would extend over a period of several years, from 2006 to 2008. These events may be of a

substantive, promotional or practical nature and include research projects, conferences, media campaigns and reports and other publications that would contribute to the exploration of the central theme selected for the review cycle (see section IV below). The involvement of all major stakeholders, including Member States, organizations, programmes and specialized agencies of the United Nations system, non-governmental organizations and the private sector, is indispensable. All stakeholders may choose to organize and/or sponsor international events related to the central theme. **The Commission may wish to invite all major stakeholders to participate in the process of the review and appraisal and contribute to its various activities and events.**

38. A major aspect of the road map for the implementation of the Madrid Plan of Action involves mainstreaming the issue of ageing and the concerns of older persons into national and international development plans and strategies. It is therefore important to evaluate the extent and the success of mainstreaming efforts. **The Commission for Social Development may wish to recommend to the Economic and Social Council the integration of the issue of ageing into the monitoring, review and appraisal exercises of other major international development initiatives and policy frameworks, including the Millennium Declaration, the Programme of Action of the International Conference on Population and Development, the Copenhagen Declaration on Social Development and the Programme of Action of the World Summit for Social Development and the Beijing Platform for Action and their follow-up processes.**

IV. Proposed theme for the first cycle of the review and appraisal

39. To spearhead the review and appraisal exercise at all levels — local, national, regional and global — the Commission for Social Development recognized the importance of choosing a specific theme emanating from the Madrid Plan of Action. The following suggested themes were received from Governments in response to the note verbale of the Secretary-General: "Towards an ageing friendly society"; "Social protection and care for dependent persons"; "Promotion of health, functional capacity and well-being throughout life"; "The role of older persons in society of the twenty-first century"; "The role of the State in the creation of conditions for the social security of older persons"; and "Participation of older persons in development".

40. Discussions during the interregional consultation organized by the secretariat produced the following suggested themes: "Improving the life quality of older persons"; "Empowerment for sustainable engagement"; "Successful adjustment to an ageing world"; "Active ageing in place"; and "Meeting the challenges of an ageing world".

41. In considering these suggestions, Governments are invited to take into account the decision of the Commission for Social Development to organize the review and appraisal of the implementation of the Madrid Plan of Action on a five-year cycle. The theme for the review and appraisal, while linked to the priority directions of the Madrid Plan of Action, should be broad enough to encompass all three of its priority directions, in order to avoid a situation in which any one of the directions is not considered during a particular review cycle. In this connection, it is suggested that

the theme should be cross-cutting in nature. **Therefore, following an analysis of the opinions expressed by several Member States, focal points on ageing of the United Nations system and non-governmental organizations, it is suggested that the Commission for Social Development consider the following theme for the first review and appraisal cycle of the implementation of the Madrid Plan of Action: "Adjusting to an ageing world".**

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Follow-up to the World Summit for Social Development and the twenty-fourth special session of the General Assembly: priority theme: review of the first United Nations Decade for the Eradication of Poverty (1997-2006)

Review of the first United Nations Decade for the Eradication of Poverty (1997-2006)

Report of the Secretary-General

Summary

The present report is prepared in response to Economic and Social Council decision 2005/230 of 20 July 2005, in which the Council approved the provisional agenda of the forty-fourth session of the Commission for Social Development with the priority theme "Review of the first United Nations Decade for the Eradication of Poverty (1997-2006)". The report reviews the first United Nations Decade for the Eradication of Poverty (1997-2006) and focuses on key developments during the Decade, including the strengthened commitment to poverty eradication at the national and international levels, the evolution of strategies for poverty eradication, the enhanced coordination within the United Nations system to support the efforts of Member States and the obstacles and challenges that still face development partners in their fight against poverty around the world. The report concludes with a set of recommendations for consideration by the Commission.

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I. Introduction

1. In accordance with the multi-year programme of work for 2002-2006 adopted at the thirty-ninth session of the Commission for Social Development, the present report addresses the priority theme for the forty-fourth session, "Review of the first United Nations Decade for the Eradication of Poverty (1997-2006)".

2. The scope of the first United Nations Decade for the Eradication of Poverty is broad and inclusive. Its objective, to achieve the goal of eradicating absolute poverty and reducing overall poverty substantially in the world, through decisive national actions and international cooperation in implementing fully and effectively all agreements, commitments and recommendations of major United Nations conferences and summits organized since 1990 as they relate to poverty eradication, underscores its long-term vision of sustained and concerted effort at the national and international levels to eradicate poverty.

3. The proposal to designate a decade for the eradication of poverty was agreed upon in the Programme of Action of the World Summit for Social Development and was formally launched by the General Assembly at its fiftieth session. The various activities that had been undertaken during the International Year for the Eradication of Poverty in 1996 under the theme "Poverty can and must be eradicated throughout the world" helped to lay the foundations for the Decade by raising awareness of the issues and sustaining efforts at the national and international levels in support of poverty eradication.

4. The review presented in the present report focuses on key developments during the Decade, including the enhanced policy framework for poverty eradication at the national and international levels, the evolution of strategies for poverty eradication, enhanced coordination within the United Nations system to support the efforts of Member States and the obstacles and challenges that still face development partners in their fight against poverty around the world. The report should be read in conjunction with the review of the further implementation of the World Summit for Social Development and the outcome of the twenty-fourth special session of the General Assembly (E/CN.5/2005/6), the Report on the World Social Situation, 2005 (A/60/117) and the report of the Secretary-General entitled "Towards achieving internationally agreed development goals, including those contained in the Millennium Declaration" (E/2005/56), which provide recent and in-depth analyses of poverty issues and recommendations for action. This review of the Decade will precede the coordination segment of the Economic and Social Council in 2006, which has as its theme "The eradication of poverty and hunger, along with sustained economic growth for social development".

II. Key developments over the Decade

A. Strengthened commitment to national action and international support

5. The eradication of poverty is a cornerstone of the United Nations comprehensive development agenda that emerged from the major United Nations conferences and summits since the 1990s. At the World Summit for Social Development, Governments committed themselves to the eradication of poverty as

an ethical, social, political and economic imperative of humankind. The Copenhagen Declaration on Social Development and the Programme of Action of the Summit recognized that people must be at the centre of development efforts and acknowledged the intrinsic link between poverty, unemployment and social integration. Governments resolved to develop national strategies to substantially reduce overall poverty and to establish time-bound and specific targets to eradicate absolute poverty.

6. The Social Summit also called upon Governments to focus their efforts and policies on addressing the root causes of poverty, providing basic needs for all, especially women and other vulnerable groups, and ensuring that poor people have access to productive resources, including credit, education and training. In addition, poor people should participate in decision-making to create policy and a regulatory environment that would reduce inequalities and enable them to benefit from expanding employment and economic opportunities. While recognizing that national Governments have the primary responsibility for eradicating poverty, the Social Summit acknowledged the critical role of the United Nations system in this respect. International organizations, particularly multilateral institutions, and donors were encouraged to support policies and programmes aimed at achieving the goal of poverty eradication and ensuring provision for the basic needs of all.

7. The twenty-fourth special session of the General Assembly, held in 2000, called upon Governments to put poverty eradication at the centre of economic and social development and to build consensus with all relevant actors on policies and strategies to reduce the proportion of people living in extreme poverty by one half by 2015. The special session also emphasized the need for comprehensive national strategies for poverty eradication that are integrated into policies at all levels, including economic and fiscal policies; capacity-building and institution-building; and giving priority to investments in education and health, social protection and basic social services. Governments were also encouraged to develop and implement sustainable pro-poor economic growth strategies that enhance the potential and ability of poor people by empowering them; providing access to productive resources and active employment; encouraging small and medium-sized enterprises; and stimulating agriculture and rural development.

8. The special session invited the Economic and Social Council to consolidate ongoing initiatives and actions established in the outcome of the Social Summit, the Decade and the recommendations emerging from the special session, with a view to launching a global campaign to eradicate poverty. In view of the central place that poverty eradication occupies among the goals of the Millennium Declaration, the global campaign for the eradication of poverty was integrated into the broader global campaign for the implementation of the Millennium Development Goals, the Millennium Campaign. This integration was strongly supported by the United Nations System Chief Executives Board for Coordination (CEB) at its first regular session in 2002.

9. Since 1995, the policy framework on poverty eradication that was articulated at the Social Summit has continued to figure prominently in the outcomes of conferences and summits, including the Millennium Summit of the United Nations. The Fourth World Conference on Women, held in Beijing, and its follow-up addressed links between absolute poverty and the feminization of poverty, and the contributions of women and their empowerment were seen as key in combating

poverty, as equality of rights strengthens women's opportunities to participate in productive activities. Likewise, the World Food Summit called for the implementation of policies to eradicate poverty. It explicitly recognized the link between poverty, inequality and food insecurity and stressed that sustainable progress in poverty eradication was critical to improving access to food. At the International Conference on Financing for Development, the elimination of poverty and the improvement of social conditions worldwide were framed as systemic challenges that must be approached from a broad perspective. The Conference called for efforts to reinforce national capacity-building in areas that included social and gender budget policies. In addition, the World Summit on Sustainable Development emphasized that poverty eradication and adequate management of the natural resource base that allows for social development were overarching objectives of sustainable development and advocated the importance of promoting socially and culturally acceptable policies, equal and equitable access to education, health-care services and economic opportunities and initiatives that enable economic and social empowerment.

10. More significantly, the commitment to eradicate poverty made at the Social Summit and reflected in the objectives of the Decade was reaffirmed strongly in the Millennium Declaration, in which Member States resolved to halve, by 2015, the proportion of people living in extreme poverty and hunger. The Millennium Development Goals have helped to galvanize efforts towards poverty eradication, but the quantification of the Millennium Development Goal poverty target in terms of the poverty threshold of a dollar a day tends to overshadow the comprehensive approach set out at the Social Summit, in which poverty was characterized not only by lack of income and consumption, but also by exclusion, marginalization and inequality.

11. The 10-year review of the implementation of the Social Summit and the outcome of the twenty-fourth special session of the General Assembly was held at the forty-third session of the Commission for Social Development, at which the Commission adopted a declaration recognizing that the implementation of the Copenhagen commitments and the attainment of the Millennium Development Goals were mutually reinforcing.[1] It reaffirmed that enhanced international cooperation and action at the national level were essential to the implementation of the Copenhagen commitments, in particular to the people-centred approach to development, and underlined that policies and programmes designed to achieve poverty alleviation should incorporate specific measures to foster social integration, including by providing marginalized socio-economic sectors and groups with equal access to opportunities.

12. The recent 2005 World Summit Outcome reaffirmed the vital role played by the major conferences and summits in shaping a broad development vision and in identifying common objectives and reaffirmed the commitment to eradicate poverty and promote sustained economic growth, sustainable development and global prosperity for all. It expressed concern over the slow and uneven progress towards poverty eradication and the realization of other development goals in some regions and emphasized the need for urgent actions, including more ambitious national development goals and efforts backed by increased international support.

B. Enhanced global partnership

13. The development of a global partnership between rich and poor countries, as agreed in the Millennium Declaration and reaffirmed and elaborated upon at the International Conference on Financing for Development and the World Summit on Sustainable Development, has yet to be fully realized. Nevertheless, some important strides have been made towards achieving this goal.

14. At the 2005 World Summit, Governments of donor and developing nations made strong and unambiguous commitments to achieve the Millennium Development Goals by 2015. Those commitments include an additional $50 billion a year by 2010 for fighting poverty, which will become available as a result of commitments by many developed countries to achieve the target of 0.7 per cent of gross national product for official development assistance by 2015, and to reach at least 0.5 per cent of gross national product for official development assistance by 2010 and 0.15 per cent to 0.20 per cent for the least developed countries by no later than 2010. There were also commitments to provide immediate support for quick-impact initiatives to support anti-malaria efforts, education and health care. With regard to financing for development, there were commitments to innovative sources of financing, including efforts to implement an International Finance Facility, and other initiatives to finance development projects, in particular in the health sector.

15. At the 2005 World Summit there was also agreement with respect to considering additional measures to ensure long-term debt sustainability through increased grant-based financing, the cancellation of 100 per cent of the official multilateral and bilateral debt of heavily indebted poor countries, including, where appropriate, significant debt relief or restructuring for low- and middle-income developing countries with unsustainable debt burdens that are not part of the Heavily Indebted Poor Countries Initiative. Countries also agreed to pursue trade liberalization and expeditious work towards implementing the development dimensions of the Doha work programme. Developing countries for their part, committed to adopting national plans for achieving the Millennium Development Goals by the end of 2006

C. Evolution of poverty reduction strategies

16. The Social Summit and the Decade not only highlighted the problem of global poverty, but also gave added impetus to the evolution of thinking on poverty and poverty reduction efforts. During the Decade, there has been a progressive broadening of the definition and measurement of poverty, from using income as a yardstick, to a definition that encompasses other dimensions of poverty, such as access to health services and education. More recently, that definition has been further expanded to embrace concerns about risk and vulnerability, social exclusion, powerlessness and lack of voice or representation. For the policymaker, the correlations between the various dimensions of poverty offer an expanded set of policies relevant to poverty reduction.[2]

17. The growing acceptance of a more holistic, multidimensional view of poverty has, in part, been driven by negative past experiences with the so-called neo-liberal development paradigm. The worsening of poverty in the wake of the Asian crisis of 1997, for example, generated widespread dissatisfaction over the adverse outcomes

of structural adjustment programmes and over-reliance on market mechanisms. At the same time, many low-income countries that had pursued primarily growth-oriented development strategies found themselves facing rising inequality and worsening poverty, especially among the poorest, when the "trickle down" effect of economic growth to poor and marginalized groups in those societies did not occur to the extent anticipated.

18. Since the Social Summit, there have been a number of international initiatives to tackle the problem of poverty and address the weaknesses of previous development efforts. Implicit in each of these recent initiatives is a specific view of the nature, if not the causes, of poverty. In response to the Social Summit, the United Nations Development Programme launched the Poverty Strategies Initiative (PSI) in 1996.[3] With an initial funding of $11 million, most of the selected country projects were started in 1997 or 1998. The Initiative supported country efforts to diagnose poverty and improve their capacity for policy analysis and implementation, which in turn helped in the development of national and local strategies for reducing poverty. The country-specific PSI efforts focus on various areas, including qualitative poverty assessment, household surveys and poverty maps, poverty reduction strategies and programmes, analyses of social spending and aid flows to basic services, national human development reports and capacity development for coordination and poverty reduction.

19. PSI, therefore, helped refocus poverty reduction as the core concern of the development agenda. More importantly, PSI advanced poverty awareness, stimulated national debate and mobilized national actors behind common policy goals in poverty reduction strategies.

20. In 1999, the World Bank and the International Monetary Fund (IMF) introduced the programme of poverty reduction strategies as a precondition for obtaining debt relief and concessional financing from both institutions under the Heavily Indebted Poor Countries Initiative and its successor, the enhanced Heavily Indebted Poor Countries Initiative. The poverty reduction strategy framework is seen as a vehicle to orient aid towards addressing key issues and achieving key objectives in the poorest countries through a participatory process, emphasizing country ownership and linking overall national policy to external assistance programmes. Its use reflects an attempt to place renewed emphasis on national ownership of development and highlights the importance and urgency of capacity-building to enable countries to design and implement such strategies.

21. As of September 2005, 49 countries, over half of which are in sub-Saharan Africa, have prepared Poverty Reduction Strategy Papers (PRSPs). However, only about half of the countries that have prepared PRSPs are under the Heavily Indebted Poor Countries Initiative. The PRSP is being explored as a means to orient bilateral development assistance by the members of the Development Assistance Committee of the Organization for Economic Cooperation and Development (OECD).

22. However, the PRSP framework has been viewed as having an unnecessarily narrow focus. The Commission for Social Development, in its agreed conclusions on national and international cooperation for social development, noted that it was necessary to place PRSPs within a wider context in which all social objectives would adequately be taken into account. At the same time, IMF recognizes that its main contribution to the Millennium Development Goals (including poverty reduction) is in promoting macroeconomic and financial stability — a crucial

prerequisite for poverty reduction and economic growth.[4] IMF is clear about its priority. Thus, to the extent that poverty reduction conflicts with macroeconomic and financial stability, it is likely to have lower priority in the PRSPs. Nevertheless, the focus of PRSPs is increasingly being aligned with the achievement of the development goals of the Millennium Declaration, principally with the first target of the Millennium Development Goals, to halve extreme poverty by 2015.

D. Improved coordination

23. Another major development during the Decade has been the strenuous efforts to ensure better coordination of action at the intergovernmental level and within the United Nations system.

1. Coordination at the intergovernmental level

General Assembly

24. The General Assembly, primarily through its annual reviews of the progress and implementation of the Decade for the Eradication of Poverty, has since 1998 adopted resolutions that have reaffirmed the Decade's goals.[5] For the first half of the Decade, the Assembly adopted the practice of requesting the Secretary-General to report on a selected theme topic in order to focus its deliberations on key poverty-related issues such as globalization, microcredit and women's employment.

25. At its twenty-fourth special session, in 2000, the Assembly undertook an overall review and appraisal of the implementation of the outcome of the Social Summit and considered further actions and initiatives to achieve the commitments adopted at Copenhagen,[6] including the goal of eradicating poverty. The special session agreed to "place poverty eradication at the centre of economic and social development and build consensus with all relevant actors at all levels on policies and strategies to reduce the proportion of people living in extreme poverty by one half by the year 2015 with a view to eradicating poverty".[7] This time-bound goal was reaffirmed in the United Nations Millennium Declaration.

26. To achieve the goal of halving extreme poverty, the 2005 World Summit emphasized the crucial role of national policies and development strategies. Developing countries resolved to adopt, by 2006, comprehensive national development strategies to achieve the internationally agreed development goals and objectives. Developed countries pledged to support these efforts through increased development assistance, the promotion of international trade as an engine for development, the transfer of technology on mutually agreed terms, increased investment flows and wider and deeper debt relief.

Economic and Social Council

27. The Economic and Social Council has a leading role in the fight against poverty. The issues addressed and decisions taken at the Council's substantive sessions throughout the Decade, especially the themes it has chosen to highlight during its high-level and coordination segments, have served to highlight and focus attention on critical issues of policy, implementation and coordination with the aim of accelerating the pace of poverty reduction.

28. In May 1998, the Council devoted a special session to the integrated and coordinated follow-up to major international conferences and summits as the first subject-oriented session of its kind. It adopted resolution 1998/44, in which it provided guidance to the United Nations system for better integrating its efforts to implement the outcome of major conferences and conducted a review of the functional commissions with specific responsibilities for the follow-up of major conferences and summits.

29. The draft ministerial communiqué entitled "The role of employment and work in poverty eradication: the empowerment and advancement of women" (E/1999/L.21), which was adopted at the Council's substantive session of 1999, recommended actions in support of national efforts to eradicate poverty, with particular attention to employment creation and work and the empowerment and advancement of women.

30. The Council's consideration of African development at its 2001 high-level segment resulted in the first formal international endorsement of the New Partnership for Africa's Development. Its resolution on the contribution of human resources to development in 2002 explicitly recognized the critical contribution of health and education to human resources development and the need to fully integrate these considerations into macroeconomic policies, including poverty reduction initiatives and to give them appropriate priority in national budgetary allocations.

31. Most recently, the outcome of the 2005 high-level segment of the Economic and Social Council constituted a major input to the 2005 high-level review by the General Assembly of the progress made in the implementation of the internationally agreed development goals and the global partnership required for their achievement. The 2005 substantive session of the Council also introduced the innovative "Voices against poverty" session, which gave non-United Nations actors a chance to interact and share their views on the Millennium Development Goals with the members of the Council.

32. The 2005 World Summit explicitly recognized the need for a more effective Council as a principal body for coordination, policy review, policy dialogue, recommendations on issues of economic and social development and implementation of the international development goals agreed at the major United Nations summits and conferences, including the Millennium Development Goals. The Council was entrusted with adapting its organization of work, agenda and current methods of work to fulfil this important role.[8]

33. Outside of its substantive sessions, the Council initiated, in 1998, a tradition of meeting each April with finance ministers heading key committees of the Bretton Woods institutions. These consultations initiated inter-institutional cooperation that paved the way for the Monterrey Consensus.[9] The Council was assigned a primary role in monitoring and assessing follow-up to the Monterrey Consensus. These Council consultations have been considered important for deepening the dialogue between the United Nations and the Bretton Woods institutions, and for strengthening their partnership for achieving the development goals agreed at the global conferences of the 1990s.

Commission for Social Development

34. During the Decade, the Commission for Social Development has played a major role by addressing the eradication of poverty in its various dimensions. The agreed conclusions and resolutions that have resulted from the deliberations of the Commission have contributed significantly to the global discourse on poverty within the broader context of social development. In particular, the adoption of priority themes by the Commission for its annual sessions has served as an important vehicle to focus the debate among Members States on many issues critical to poverty eradication.[10] For example, the eradication of poverty was the first priority theme addressed by the Commission after the Social Summit, in 1996.

35. During its thirty-fifth session, the Commission examined the topic "Productive employment and sustainable livelihoods". In its agreed conclusions, the Commission emphasized the importance of setting time-bound goals and targets for expanding employment, reducing unemployment and increasing productivity in rural and urban informal sectors through improving access to credit, fertile land, productive inputs, infrastructure, basic social services, information and extension services.

36. On the tenth anniversary of the Social Summit, the Commission, at its forty-third session, reviewed the further implementation of the outcome of the Social Summit and the twenty-fourth special session of the General Assembly. Central in its deliberations was the commitment to poverty eradication. In the ministerial declaration adopted at the high-level segment of its forty-third session, the Commission urged that the people-centred approach to development envisioned in the Copenhagen Declaration on Social Development be restored and called for policies to link the efforts of poverty eradication to the fostering of social integration and to the promotion of employment strategies. Of particular importance was the call for the issues of employment and social integration to be injected into the Millennium Development Goals in order to broaden the concept of poverty eradication. The Commission requested that its Declaration be transmitted to the 2005 World Summit, through the Economic and Social Council, as a contribution to the review of the Millennium Declaration.

Coordination within the United Nations system

37. The organizations of the United Nations system have made significant progress in integrating the Millennium Development Goals and the goals of the United Nations development agenda in their programmes of work and in developing system-wide approaches to support the implementation of the development agenda at the country level. The United Nations system strives to improve the coordination of its work in the area of economic and social development so as to avoid duplication and overlap and thus ensure that the various parts of the United Nations system are better placed to complement and draw upon each other's work, both at headquarters and in the field. CEB, the Executive Committee on Economic and Social Affairs and the United Nations Development Group (UNDG) have been tasked with coordinating the activities of the United Nations system in the area of poverty eradication.

38. Since 2001, CEB — formerly the Administrative Committee on Coordination — has been actively engaged in reviewing and assessing actions by the organizations of the system at all levels to ensure that the Millennium

Declaration and the Goals contained therein are a key, integral part of the priorities orienting the work of the system. In addressing key strategic issues that cut across the programmatic, sectoral interventions of its member organizations, CEB has sought to reinforce synergies among the implementation activities of United Nations organizations.

39. Poverty eradication and the objective of promoting equity and equality at both the national and international levels have been the overarching goals that guide CEB in contributing to the development of a focused global agenda, based on the outcomes of global conferences. During 1998, the then Administrative Committee on Coordination addressed the problem of poverty eradication, issuing at the conclusion of its spring session a policy statement on the subject and endorsing a set of guidelines to foster inter-agency cooperation at the field level (see E/1999/48). At the first regular session of the Administrative Committee on Coordination in 2000, executive heads underscored the fact that poverty eradication was the greatest challenge of globalization. At its fall 2000 session, and its first regular session of 2001, the Committee addressed the role of the United Nations system in the processes to follow up the Millennium Summit, particularly in respect of the first target of the Millennium Development Goals, to halve poverty by 2015 (ACC/2001/4). This focus on orchestrating closer inter-agency cooperation towards the attainment of the Millennium Development Goals has remained a guiding principle of the work of CEB.

40. The establishment of the four Executive Committees was an important component of the reform process launched by the Secretary-General in early 1997. The aim in establishing these Executive Committees was to sharpen the contribution that each entity makes to the overall objectives of the Organization by reducing duplication of effort and facilitating greater complementarity and coherence. The Executive Committees are designed, therefore, as instruments of policy development, decision-making and management in which the heads of United Nations entities consult with one another on work programmes and other substantive and administrative matters of collective concern in order to identify and exploit ways of pooling resources and services so as to maximize programme impact, minimize administrative costs and, more generally, facilitate joint strategic planning and decision-making.

41. To facilitate its role as envisioned in the Secretary-General's reforms, the Executive Committee on Economic and Social Affairs has prepared four major substantive reports related to critical contemporary issues in economic and social development that underlie the comprehensive United Nations development agenda, including efforts to eradicate poverty.[11] These reports are the product of a collaborative and coordinated effort of the Executive Committee on Economic and Social Affairs and represent the collective position of the United Nations Secretariat in the economic, social and related fields on these pressing issues.

42. UNDG is also an instrument for United Nations reform created by the Secretary-General in 1997 to improve the effectiveness of United Nations development efforts at the country level. UNDG brings together the operational agencies working on development and develops policies and procedures that allow member agencies to work together and analyse country issues, plan support strategies, implement support programmes, monitor results and advocate for change. These initiatives increase the United Nations impact in helping countries achieve the

Millennium Development Goals, including the overarching goal of poverty eradication. The results-oriented priorities of UNDG for 2005 include achieving national ownership and programme coherence at the country level, strengthening of the resident coordinator system and achieving an effective United Nations role in situations of transition from relief to development.

43. In addition to the more institutionalized forms of inter-agency cooperation, such as CEB and its high-level committees, UNDG and the Executive Committees, there are extensive networks of informal collaborative arrangements and joint initiatives that focus on supporting the implementation of the Millennium Declaration and the outcomes of other global conferences. For example, the Food and Agriculture Organization of the United Nations, the International Fund for Agricultural Development and the World Food Programme, have formed a United Nations system Network on Rural Development and Food Security, while the International Labour Organization (ILO), the United Nations Secretariat and the World Bank closely collaborate on youth employment issues in the Secretary-General's youth employment network. Cooperation schemes also exist in various other fields: humanitarian, education for all, health, youth, gender, environmental sustainability, governance, human rights and HIV/AIDS.

44. Instruments at the country level, such as the common country assessment, the United Nations Development Assistance Framework (UNDAF) and its results matrix, thematic groups and joint programming initiatives, are working towards delivering more strategic and integrated approaches. The UNDAF process, in particular, is increasingly being focused to assist Governments in translating and realigning the internationally agreed development goals, including those contained in the Millennium Declaration, into national policies, strategies and programmes. The results matrix in the UNDAF process enables United Nations system organizations to orient their programmes and operations around the development goals, monitor and evaluate the effectiveness of their operations and build national capacities to monitor and evaluate implementation.

III. Progress in poverty eradication

A. Trends

45. Progress in poverty eradication over the Decade has been mixed. At the global level, the proportion of poor people living on less than one dollar a day in developing countries declined from 27.9 to 21.3 per cent between 1990 and 2001, a transition of roughly 118 million persons out of extreme poverty. If current trends are maintained, the goal is likely to be achieved at the global level in 2015, and the number of people living in extreme poverty would just fall below 735 million by 2015, from about 1.22 billion in 1990.

46. However, this global picture masks important disparities at the regional level. Global poverty reduction has been driven by the success of East Asia and the Pacific and South Asia, who are on track to achieve the Millennium Development Goal target of halving extreme poverty at the national level by 2015. China, in fact, has already achieved the poverty reduction target: the number of people living in extreme poverty there fell from 377 million to 212 million between 1990 and 2001, or from 33 per cent to 16.6 per cent of the population.

47. All other regions have experienced setbacks since 1990. Some countries are at severe risk of falling short of the goal. Sub-Saharan Africa is the least likely to achieve the income poverty target, having made no progress in reducing the incidence of poverty in the 1990s. In sub-Saharan Africa, if current trends continue unchanged, only eight countries are projected to halve extreme poverty by 2015. The incidence of poverty is much lower in Latin America and the Caribbean, but progress in further reducing poverty has been slow. In Europe and Central Asia, poverty rates rose in the 1990s.

B. Obstacles and challenges

48. The mixed results in achieving poverty reduction demonstrate the fact that many countries continue to face deep-rooted obstacles and challenges in hastening the pace of poverty reduction. Sustained pro-poor economic growth is a necessary condition for accelerated poverty reduction and sustained human development, but the average per capita income growth in developing countries in the 1990s was 1.5 per cent per annum. Since 2000, the average annual growth rate of per capita income in developing countries has increased to 3.4 per cent, although this result is influenced by the high rate of growth recorded in East Asia, notably in China, and the recent economic take-off in India. In other regions of the world, the recorded growth in per capita income is less encouraging. Sub-Saharan Africa, for example, has posted an average growth rate of 1.2 per cent a year since 2000.

49. The rate of progress in income poverty reduction depends also on the distribution of income and the share of the poor in economic growth at any level. The higher the level of income inequality, the less impact economic growth has in reducing poverty at any given rate of growth. There is evidence there has been rising inequality within countries over the past two decades.[12] This implies that the share of national income going to the poorest has fallen over the period. In broad terms, OECD countries and South Asia have the lowest income inequality, with a Gini coefficient of 36.8 and 33.4, respectively.[13] In contrast, sub-Saharan Africa and Latin America register the highest levels of inequality, with a Gini coefficient of 72.2 and 57.1 respectively. In sub-Saharan countries, the weak results for poverty eradication reflect the weak growth and unequal distribution of income. In order to accelerate poverty reduction in these countries, there needs to be pro-poor growth that is both broad and inclusive. Poverty and life chances in general are influenced by different types of factors and inequalities, which interact to create dynamic and mutually reinforcing vicious cycles of poverty. Breaking these cycles will be an important and fundamental challenge in poverty eradication efforts.

50. Gender inequality is also a major barrier to progress in reducing income poverty. Women have less access to paid employment than men in most of the developing world. Women in Southern Asia, Western Asia and Northern Africa still hold only about 20 per cent of paying jobs in sectors outside of agriculture.[14] The gender empowerment measure of the *Human Development Report*, an indicator of progress towards the empowerment of women, shows little progress.[15] For example, trend projections show that gender parity in primary and secondary school enrolment will still lag far behind the target of eliminating gender disparity in primary and secondary schooling.[16]

51. There is still a deep division between rural and urban communities. Poverty rates are higher and there is less access to services in rural communities. Successful poverty reduction demands attention to promoting and supporting rural development. There is some evidence suggesting a link between poverty reduction and agricultural growth. The trends in per capita agricultural output in China and sub-Saharan Africa are consistent with their observed trends in poverty reduction. In China, agricultural output per capita increased as the incidence of poverty decreased, while in sub-Saharan Africa the level of extreme poverty increased as agricultural output per capita declined.[17] This evidence suggests that in order to reduce poverty effectively in countries in which the poor are largely dependent on agriculture an explicit agricultural strategy is needed to raise agricultural productivity and create opportunities for more productive employment.

52. HIV/AIDS is another major factor affecting poverty and has had a particularly devastating impact on sub-Saharan Africa, where average life expectancy declined from 50 years in 1990 to 46 years in 2002. The disease is most often contracted by adults in the prime of life, and ILO estimates that at least 26 million workers aged 15 to 49, many of them primary breadwinners, are infected with the virus worldwide. The consequences of HIV/AIDS extend far beyond the direct impact of the disease itself when one takes into account the fate of millions of orphans and older persons who end up excluded from mainstream employment and social protection programmes with the loss of the breadwinners in their families. Deaths from HIV/AIDS often leave the surviving dependants in poverty and can negatively affect the educational development of the surviving children, making it much more difficult for them to either escape from or stay out of poverty later in life. Furthermore, many older persons find support and resources seriously depleted at the same time as they are called on to help others, such as their orphaned grandchildren.

53. Armed conflicts tend to reinforce poverty and need to be addressed and resolved before there can be any hope of eradicating absolute poverty. Although recent years witnessed a marked reduction in the number of conflicts, from 51 in 1991 to 29 in 2003, the duration of current conflicts is longer,[18] and the impact of these longer periods of conflict on human development is severe. The nature and geography of conflicts have also changed: at the start of the twenty-first century, most conflicts are within States and most victims are civilians. Over the period from 1990 to 2003, low-income countries accounted for more than half of the countries and territories that experienced violent conflict.[19] Nearly 40 per cent of the world's conflicts are in Africa.

C. Lessons learned

54. The multidimensional view of the Social Summit on poverty, as highlighted by the Decade, remains a guiding force for policymaking in the social development sphere and continues to influence the debate on poverty strategies. Over the period of the Decade, important lessons have been learned about how to attack poverty.

55. One important lesson is the need for a participatory process that is country-driven and that promotes ownership as a necessary precondition for the successful implementation of policies and programmes. Participation of the poor in processes and decisions that affect their lives is crucial, and broad-based participation is one

of the guiding principles for the poverty reduction strategies in order to improve governance and accountability. Involving the poor in the design process is predicated upon the experience that the poor often have better knowledge of their situation and needs.[20] This recognition implies that poverty initiatives should incorporate the means to strengthen or build capacity for greater participation and input from the poor themselves.

56. At the same time, since development is seen as the primary responsibility of each country, national policies and poverty reduction strategies should reflect and take into account the specific context of a country's level of development and priorities. Just as poverty reduction strategies flourish in a participatory environment, such a participatory approach can take root more easily when democratic governance is present.

57. Lack of representation, political power or enforcement of legal rights and social exclusion and discrimination must be addressed since "discrimination may cause poverty, just as poverty may cause discrimination" (E/C.12/2001/10, para. 11). The marginalized, including women, minorities, indigenous peoples, rural residents and other groups with special needs, should be given a voice, especially in issues that directly concern them. Thus, programmes that promote the empowerment, representation and participation of marginalized groups in society should be built into poverty reduction strategies.

58. Empowered women can be some of the most effective drivers of development. Direct interventions to advance gender equality include measures such as increasing primary school completion and secondary school access for girls; ensuring secure tenure of property for women; ensuring access to sexual and reproductive health services; promoting equal access to labour markets; providing the opportunity for greater representation in government decision-making bodies; and protecting women from violence. The promotion of poor people's access to financial services, such as microcredit and microfinance often has a strong empowering outcome, especially among poor women, since it allows them to take advantage of employment opportunities while enhancing their status within their communities.

59. The experience with poverty initiatives also highlights the importance of having strategies that are results-oriented and have outcomes that can be measured and monitored. This practice is being promoted largely through the adoption of the quantified targets of the Millennium Development Goals and with the realignment of the poverty reduction strategies with the Millennium Development Goals. Monitoring of the Millennium Development Goals is already under way at the country level, and countries have undertaken Millennium Development Goals reports as part of their voluntary reporting of progress towards achieving the development goals of the Millennium Declaration. As of August 2005, a total of 155 Millennium Development Goals reports had been published by 139 countries, including 17 donor countries.

60. An important lesson is that widely disseminated documentation and reporting on poverty can lead to broader discussions and consultations with various stakeholders. The reporting on the Millennium Development Goals has engaged political leaders and top decision makers, and mobilized civil society, communities, the general public and the media. Thus, the reporting process can serve as an important tool for awareness-raising, advocacy, alliance-building and the renewal of

political commitments at the country and international levels as well as for building national capacity for monitoring and reporting on goals and targets.

61. It has also been recognized that policy decisions aimed at poverty reduction and eradication should also be targeted, rather than simply relying on the trickle-down effects of broad economic and social policies to promote economic growth and development.[21] An integrated policy approach to poverty eradication should include a sustainable growth strategy that is broad and inclusive instead of focusing on economic growth in which expansion is localized within a geographic and/or sectoral enclave.

62. In addition, sustained poverty reduction cannot be achieved unless socio-political dimensions, which are often downplayed or overlooked, are incorporated in a comprehensive strategy. Since policies that address the inequalities in access to basic social services, such as health and education, can increase the capacity of the poor to improve the quality of their lives, the provision of basic social services should be incorporated in poverty strategies. This is particularly important in addressing HIV/AIDS, tuberculosis, malaria and other infectious diseases.

63. Finally, measures that help mitigate risk and vulnerabilities arising from armed conflict, violence and natural disasters are essential in addressing both transient and chronic poverty. This includes the provision of social safety nets to cushion the impact of social and economic crises, a lesson learned in the wake of the Asian financial crisis and the extensive natural disasters of recent years. Poverty reduction strategies that do not incorporate risk mitigation and vulnerabilities of the poor are likely to fail, given the realities of disasters and conflicts, which are often beyond their control.

IV. Looking forward and recommendations

64. The Decade provided the first long-term vision for poverty reduction and eradication in an integrated and coordinated way for the United Nations and the international community. The summits and conferences that were convened during the Decade reinforced the urgency and primacy of poverty reduction and eradication within the comprehensive United Nations development agenda. The Millennium Declaration captured the imagination and commitment of world leaders in 2000 and the internationally agreed development goals contained in that Declaration now provide the globally accepted benchmarks of broader progress that have been embraced by donors, developing countries, civil society and major development institutions.

65. However, as has been argued here and elsewhere, the Millennium Development Goals do not in themselves represent a complete development agenda, although they represent a key component of the comprehensive United Nations development agenda. In particular, the Millennium Development Goals do not directly encompass some of the broader issues covered by the conferences of the 1990s, nor do they address the particular needs of middle-income developing countries or the questions of growing inequality and the wider dimensions of human development and good governance, which all require the effective implementation of conference outcomes.

66. Nevertheless, the urgency of achieving the Millennium Development Goals, especially the goal of poverty eradication, cannot be overstated. As the preceding analysis has shown, despite good progress in some regions that strongly suggests that the target to halve poverty will be achieved in aggregate by 2015, progress is weak and falling short of what is needed, especially in the poorest countries. It is evident that there need to be positive, concerted efforts to fill what many in the international community refer to as the "implementation gap" that has followed several world summits and conferences. Slow progress or lack of progress towards the Millennium Development Goals is due to inadequate appropriate implementation in many countries.

67. The Millennium Project has proposed an action plan to bridge the "implementation gap" and achieve the Millennium Development Goals, in particular the goal to halve poverty by 2015. This action plan argues that the Millennium Development Goals can be achieved globally by most, if not all, countries if there is commitment to and implementation of concerted and coordinated action at the national and international levels to accelerate and scale up action until 2015. The political will and global partnership necessary to undertake this decisive action at the national and international levels are emerging; the true test is whether the needed global development assistance will materialize over the next few years to support broad-based actions by developed and developing countries to address the Millennium Development Goals, in particular the target of halving extreme poverty and hunger by 2015.

68. The 2005 World Summit called upon each developing country in extreme poverty to adopt by 2006 and begin to implement a national development strategy bold enough to meet the targets of the Millennium Development Goals for 2015. This will require the national strategy to incorporate the scaling-up of public investments, capacity-building and domestic resource mobilization, together with predictable and effective support of official development assistance where needed. It is especially important that countries that already have Poverty Reduction Strategy Papers should align these to achieve the Millennium Development Goals.

69. Rapid poverty reduction cannot take place in the absence of sustainable pro-poor growth, and this national development strategy should be implemented within the context of dynamic, growth-oriented economic policies that create an environment enabling faster sustainable economic growth. Attention needs to be paid to investments in human capital and infrastructure, an enabling legal and regulatory environment for small and medium-sized firms, good governance and expanded access to financial capital, including microfinance. In addition, there should also be efforts directed towards agricultural development and the needs of small farmers; the problems of the large and growing number of urban poor; universal access to basic health services, including services to promote child and maternal health, to support reproductive health and to control killer diseases, such as AIDS, tuberculosis and malaria; and the role of civil society organizations and the private sector as vital partners for poverty reduction.

70. The Commission for Social Development has, during the first United Nations Decade for the Eradication of Poverty, stressed the multidimensional character of poverty and the need for an integrated and holistic approach to poverty eradication. In the light of the conclusions in the present report, and taking into account the recommendations contained in the report of the Secretary-General on the review of

further implementation of the World Summit for Social Development and the outcome of the twenty-fourth special session of the General Assembly, the Commission for Social Development may wish to:

(a) **Urge all countries with extreme poverty to make every effort to adopt by 2006 and begin to implement a national development strategy in order to halve extreme poverty by 2015;**

(b) **Ensure that policies and programmes designed to achieve poverty eradication include specific measures to foster social integration, including by providing marginalized socio-economic sectors and groups with equal access to opportunities;**

(c) **Urge countries to adopt full, productive and decent employment as a central objective of national and international macroeconomic policies, fully integrate this objective into poverty reduction strategies, including, where they exist, Poverty Reduction Strategy Papers, and encourage countries to set time-bound goals and targets for expanding employment and reducing unemployment, including national action plans for youth employment.**

Notes

[1] See *Official Records of the Economic and Social Council, 2005, Supplement No. 6* (E/2005/26), chap. I, sect. A, para. 1.

[2] Ravi Kanbur and Lyn Squire, "The Evolution of Thinking About Poverty: Exploring the Interactions", mimeograph, 1999. Revised version published in G. Meier and J. Stiglitz (eds.), "Frontiers of Development Economics: The Future in Perspective" (Oxford University Press, 2001).

[3] "Choices for the Poor", published by the United Nations Development Programme in 2001, and http://www.undp.org/poverty/povertyarchive/initiatives/psi/ accessed October 2005.

[4] "Strengthening the IMF's Support for Low-Income Countries", published by the International Monetary Fund in September 2005.

[5] Resolutions 53/198, 54/232, 55/210, 56/207, 57/266, 58/222 and 59/247.

[6] *Report of the World Summit for Social Development, Copenhagen, 6-12 March 1995* (United Nations publication, Sales No. E.96.IV.8), chap. I, resolution 1, annexes I and II.

[7] General Assembly resolution S-24/2, paragraph 25.

[8] See General Assembly resolution 60/1.

[9] *Report of the International Conference on Financing for Development, Monterrey, Mexico, 18-22 March 2002* (United Nations publication, Sales No. E.02.II.A.7), chap. I, resolution I, annex.

[10] The following topics were considered at various sessions of the Commission for Social Development: "Productive employment and sustainable livelihoods" (thirty-fifth session); "Promoting social integration and participation of all people, including disadvantaged and vulnerable groups and persons" (thirty-sixth session); "Social services for all" (thirty-seventh session); "Enhancing social protection and reducing vulnerability in a globalizing world" (thirty-ninth session); "Integration of social and economic policies" (fortieth session); "National and International Cooperation for Social Development" (forty-first session); and "Improving public sector effectiveness" (forty-second session).

[11] See http://www.un.org/esa/coordination/ecesa.

[12] The Inequality Predicament: *Report on the World Social Situation 2005* (United Nations publication, Sales No. 05.IV.5), p. 47.

[13] Countries with Gini coefficients above 50 can be said to be in the high inequality category.

[14] *The Millennium Development Goals Report 2005*, http://unstats.un.org/unsd/mi/mi_dev_report.htm p. 15.

[15] "Human Development Report 2005: International cooperation at a crossroads" (Oxford University Press, 2005).

[16] Ibid., pp. 43-44.

[17] *World Employment Report 2004-05: Employment, Productivity and Poverty Reduction*, published by the International Labour Organization, 2005.

[18] *Human Development Report 2005*, p. 154.

[19] Calculations based on Havard Strand, Lars Wilhelmsen and Nils Petter Gleditsch, "Armed Conflict Data Project 2004: Armed Conflict Database" (International Peace Research Institute, 2005).

[20] Ravi Kanbur and Lyn Squire, op. cit., p. 22.

[21] *The Inequality Predicament: Report on the World Social Situation 2005*, p. 133.

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Monitoring of the implementation of the Standard Rules on the Equalization of Opportunities for Persons with Disabilities

Note by the Secretary-General

At its forty-eighth session, the General Assembly adopted the Standard Rules on the Equalization of Opportunities for Persons with Disabilities, contained in the annex to its resolution 48/96 of 20 December 1993.[1] These 22 Rules provide a framework to further implement the goals of equality and full participation of disabled persons in social life and development as set forth in the World Programme of Action concerning Disabled Persons, adopted by the General Assembly in its resolution 37/52 of 3 December 1982.[2] In section IV, paragraph 2, of the Standard Rules, it was stipulated that the Rules should be monitored within the framework of the sessions of the Commission for Social Development. The appointment of a Special Rapporteur to monitor their implementation was also envisaged in that paragraph. In March 1994, the Secretary-General appointed Bengt Lindqvist (Sweden) Special Rapporteur on Disability of the Commission for Social Development. Mr. Lindqvist prepared three reports for the consideration of the Commission during his mandate,[3] which was renewed in 1997 and in 2000.[4] In June 2003, the Secretary-General appointed Sheikha Hessa Al-Thani (Qatar) Special Rapporteur for the period 2003-2005. The Special Rapporteur submitted an oral report to the Commission for Social Development at its forty-second session.[5] At its forty-third session, in February 2005, the Commission considered the report of the Special Rapporteur on the monitoring of the implementation of the Standard Rules during the 20 months since her appointment.[6] By its resolution 2005/9 of 21 July 2005, the Economic and Social Council welcomed the work of the Special Rapporteur, decided to renew her mandate through 31 December 2008, and

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requested the Special Rapporteur to submit to the Commission for Social Development an annual report on the monitoring of the implementation of the Standard Rules. The Secretary-General has the honour to transmit to the Commission the annual report of the Special Rapporteur.

Notes

[1] Available at www.un.org/esa/socdev/enable/dissre00.htm.

[2] A/37/351/Add.1 and Add.1/Corr.1, sect. VIII; available at www.un.org/esa/socdev/enable/diswpa00.htm.

[3] A/52/56, available at www.un.org/esa/socdev/enable/dismsre0.htm; E/CN.5/2000/3, annex, at www.un.org/esa/socdev/enable/disecn003e0.htm; and E/CN.5/2002/4, at www.un.org/esa/socdev/enable/disecn520024e0.htm.

[4] Economic and Social Council resolutions 1997/19 (www.un.org/documents/ecosoc/res/1997/eres1997-19.htm) and 2000/10 (www.un.org/esa/socdev/enable/ecosoc2000-10.htm).

[5] Available at www.un.org/esa/socdev/enable/srcsocd42.htm.

[6] E/CN.5/2005/5, available at www.un.org/esa/socdev/enable/srreportdec04.htm.

Report of the Special Rapporteur on Disability of the Commission for Social Development on monitoring of the implementation of the Standard Rules on the Equalization of Opportunities for Persons with Disabilities

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I. Introduction

1. This is my third report to the Commission for Social Development on the progress of Member States in the implementation of the Standard Rules on the Equalization of Opportunities for Persons with Disabilities. As on previous occasions, I am awed by the responsibility that you have entrusted to me, and I hope to be able to carry it out.

A. Guiding principles

2. Throughout my work and regardless of the nature of the activities, there have been two main principles that guided my work. The first is the approach taken in carrying out the tasks and activities, and the second is the overarching goal towards which all activities are aimed.

The approach

3. During the past year, I have striven to adopt a constructive and affirmative approach, preferring to highlight the positive and celebrate the successes, while at the same time emphasizing the need for greater achievement and more concerted efforts.

The overall goal

4. While continuing to monitor, assess, evaluate and advocate for more meaningful and deeper implementation of the Standard Rules, I have not lost sight of the fact that the ultimate goal of all the work being done is the equalization of opportunities for persons with disabilities.

5. Equalization of opportunities is a universal concept measured against universal norms, which should apply to all cultures and countries equally. The challenge is that we live in an increasingly diverse world where levels of development, cultural values, attitudes, norms, needs and services differ from one region to another, from one country to another, and even within the same country.

6. While some countries are trying to perfect the conditions of equalization of opportunities for their disabled populations, there are other countries in which most have not been able to achieve basic human rights. This makes the job of monitoring the implementation of the Standard Rules extremely challenging.

7. Added to this are the complexity and diversity within the disability movement itself and among the different types of disabilities. In many cases accessibility takes on a different meaning for people with different disabilities living in different geographical areas. This recognition of diversity has given rise to a richer culture within the disability movement, but it also requires that we monitor the equalization of opportunities in different ways by applying a variety of methods and looking at it from different angles and dimensions.

Scope of the report

8. The present report builds on those of previous years. It is based on the vision of the Standard Rules on the Equalization of Opportunities for Persons with Disabilities, and encompasses the duties of the Special Rapporteur relating to the

monitoring of Governments' implementation of the Rules, as detailed in section IV of the Rules.

9. The present report is in two parts. The first deals with the results of the global survey on Government actions for the implementation of the Standard Rules. The purpose is to present a preliminary picture of the results. This is the first comprehensive survey to assess Governments' moral and political commitment to the implementation of the Standard Rules since their unanimous adoption by the international community. By targeting all Member States and two disabled persons' organizations in each country, the survey differs from its predecessors. It also differs from previous surveys by addressing each of the Standard Rules separately. The second part of the report deals with the activities and achievements of the past year.

II. Global survey on Government actions for the implementation of the Standard Rules on the Equalization of Opportunities for Persons with Disabilities

10. The idea of conducting a comprehensive survey was conceived at the start of the Special Rapporteur's mandate in 2003. However, it was not possible to do it at the time owing to practical, financial and logistical constraints.[1]

11. Work on the survey began with the design of the questionnaire in June 2004. At the same time, a number of measures and steps were taken to guarantee the best possible results.[2]

A. Purpose and goals

12. The purpose and goals of the survey are as follows:

(a) Determine the level and degree to which the Standard Rules have been implemented worldwide;

(b) Increase Governments' awareness of the Standard Rules and draw their attention to their moral and political obligation to implement them;

(c) Present to Governments possible steps to implement the Standard Rules by listing them among the responses to each question;

(d) Identify the demographic, economic, social and political characteristics of those countries that have succeeded in implementing the Rules;

(e) Chart the progress made by each country in the implementation of the Standard Rules and areas requiring further work;

(f) Identify the challenges to implementing the Standard Rules;

(g) Lay the foundations for a comprehensive database relating to Government actions on the implementation of the Standard Rules and use it in future monitoring activities;

(h) Identify the strengths and weaknesses in the implementation of the Standard Rules worldwide;

(i) Seek the participation of disabled persons' organizations and solicit their opinions with regard to Government programmes and efforts to implement the Standard Rules;

(j) Use the survey as a tool to encourage dialogue at the national and regional levels between disabled persons' organizations and Governments around the issues of equalization of opportunities. The survey may also serve as a guide to Government interventions.

B. Target population

13. Consistent with its unanimous adoption and its reflection upon the moral and political commitment of Governments around the world, the survey covered all 191 Member States.

14. In recognition of the role that disabled persons' organizations play as motivators, advocates and participants in the implementation of the Standard Rules, and in keeping with the vision of the Standard Rules that requires the participation of such organizations and the equalization of opportunities, two disabled persons' organizations from each country were included in the survey.

C. Survey instrument

15. The survey is a comprehensive, detailed document, inclusive of every procedure Governments have agreed to implement in fulfilment of their commitment to the equalization of opportunities. Each question included a checklist relating to the procedure, and respondents were requested to tick applicable responses.[3]

D. Administering the survey

16. A period of three months was given to fill out the questionnaire and return it to the office of the Special Rapporteur. Distribution began in November 2004 and the deadline was set for 31 January 2005.

17. To include the widest number of disabled persons' organizations, the help of such organizations as the World Blind Union, the World Federation of the Deaf, Inclusion International and the Center for International Rehabilitation was enlisted.

18. The deadline was extended until the end of February after the office of the Special Rapporteur received only a limited number of responses. Respondents were asked to include the legislation adopted and to elaborate on any other measures not included in the checklist provided.

19. No specific questions were cited for Rules 14 and 15. Instead, "policies" and "legislation" were included as alternatives for the other rules.

20. To ensure space for free expression, a section was included to allow respondents to state their opinions and impressions on all of the issues raised, as well as the survey itself.

E. Preliminary results of the survey

21. All told, 191 questionnaires were sent to Governments and 382 to disabled persons' organizations.

22. A preliminary audit of the returns resulted in the rejection of 16 questionnaires owing to incomplete responses or missing pages. Some 73 Governments and 41 disabled persons' organizations responded to the questionnaire, providing detailed information about 114 countries, or 60 per cent of all Member States.[4] No responses were received from 77 countries, or 40 per cent of Member States.[5]

23. Some countries with a federal system of Government felt unable to respond, as each province or state had its own legislation, plans and programmes.[6]

24. What is most notable is the high response rate from the Arab region. At 86 per cent, this is the highest rate of response from that region in the history of these surveys.[7]

Rule 1
Awareness-raising

25. Respondents were asked about the measures taken to raise awareness in society about persons with disabilities, their rights, their needs, their potential and their contribution.

26. Some 64.0 per cent of respondents stated that their countries had adopted national awareness-raising policies, while 58.8 per cent responded that they had passed legislation.

27. Concerning the adoption of programmes and the drafting of media guidelines for raising public awareness, 61.4 per cent and 30.7 per cent, respectively, responded that they had done so. Additionally, 52.6 per cent of the responding countries said they had trained personnel in raising public awareness; 58.8 per cent had disseminated printed materials; 37.7 per cent had integrated awareness-raising into the school curriculum; and 53.5 per cent had worked on educating the public about the rights, needs and potential of persons with disabilities. The survey also revealed that 75.4 per cent of countries that responded routinely consult and collaborate with organizations of persons with disabilities.

28. Many countries also provided examples of the measures taken to raise public awareness, such as designating a national day and celebrating the International Day of Disabled Persons (3 December).

29. In response to the question about the nature and scope of the awareness-raising materials, 67.5 per cent stated that they covered all types of disabilities, including developmental and psychosocial disabilities; 70.2 per cent indicated that materials were inclusive of the social, political and development rights of persons with disabilities; and 69.3 per cent responded that the materials included the right to services, full participation and equal opportunities.

30. On the issue of the potential of persons with disabilities, 64.9 per cent responded that their materials raised awareness of the issue; 66.7 per cent indicated that their materials included contributions of persons with disabilities to social, cultural, scientific and economic spheres; and 67.5 per cent responded that their media content described persons with disabilities in positive terms, considered the

rights of persons with disabilities, and gave ample weight to issues of rights, diversity, dignity and equality.

31. In 15.8 per cent of responding countries, the media promote attitudes of pity and compassion or negative stereotypes, in addition to discounting the role, needs and even the existence of persons with disabilities.

Rule 2
Medical care

32. Respondents were asked whether Governments provided effective medical care to persons with disabilities.

33. Of the countries that responded to the survey, 60.5 per cent indicated they had adopted policies to ensure access to effective medical care for persons with disabilities; 44.7 per cent had passed legislation; 56.1 per cent had introduced programmes; 64.9 per cent had allocated funds for medical care; and 56.1 per cent had trained medical personnel to deliver appropriate medical programmes.

34. Additionally, 64.9 per cent indicated that they had made medical care accessible to persons with disabilities. The proportion of countries that consulted with disabled persons' organizations was 60.5 per cent, and 56.1 per cent of responding countries stated that they provided persons with disabilities with accessible information on medical services.

35. Many countries also indicated other measures, such as setting up occupational rehabilitation units.

36. In response to the question about measures relating to the health of persons with disabilities, 71.1 per cent stated that they had taken steps to raise awareness about the causes of disability; 78.1 per cent had worked on improving pre- and post-natal care; 65.8 per cent had implemented early detection; and 64.9 per cent had implemented early intervention measures.

Rule 3
Rehabilitation

37. Respondents were asked whether Governments ensured the provision of rehabilitation services to persons with disabilities, to reach and sustain their optimum level of independence and function.

38. The survey revealed that 56.1 per cent of countries have adopted national policies on rehabilitation; 49.1 per cent have passed legislation; 59.6 per cent have introduced programmes; 64.0 per cent have allocated financial resources; 65.8 per cent have trained personnel in rehabilitation and 71.9 per cent have adopted measures to ensure access to rehabilitation services for persons with disabilities. The proportion of countries that consult disabled persons' organizations is 71.1 per cent.

39. With respect to the inclusiveness of rehabilitation services, 59.9 per cent responded that they offered such services to people with all types of disabilities; 77.2 per cent to children with disabilities; 69.3 per cent to women with disabilities; 67.5 per cent to persons with disabilities on low and limited incomes; 57.9 per cent to all geographical areas and segments of societies; and 62.3 per cent regardless of race and ethnicity.

40. Of those countries that responded, 59.6 per cent and 57.9 per cent, respectively, indicated that they provided rehabilitation services to organizations of persons with disabilities and to the families of persons with disabilities; while 46.5 per cent and 47.4 per cent, respectively, offered community-based services and covered the needs of all types of disabilities. Fourteen per cent offered no rehabilitation services.

41. On the planning, design, delivery and evaluation of rehabilitation services, 70.2 per cent said that they were done with the help of medical personnel and 50.0 per cent with the participation of families of persons with disabilities; 60.5 per cent said that rehabilitation programmes extended to schools, educational institutions and teachers; and 40.4 per cent acknowledged the involvement of the communities where persons with disabilities live. With regard to the participation and consultation of disabled persons' organizations in planning, designing and executing rehabilitation programmes, 55.3 per cent responded positively while 17.5 per cent stated that no consultation and collaboration mechanisms existed.

Rule 4
Support services

42. Respondents were asked whether Governments provided support services, including assistive devices, to help persons with disabilities to increase their level of independence in their daily living and to exercise their rights.

43. The survey revealed that 50.9 per cent have adopted policies relating to support services; 50.0 per cent have passed legislation; 46.5 per cent have allocated financial resources; 69.3 per cent supply persons with disabilities with the necessary devices and equipment; and 63.2 per cent do so in consultation with disabled persons' organizations.

44. As for services provided by Governments in response to needs in the areas of technology, personal assistance, interpretation services and others, 61.4 per cent responded that they provided such services to children; 55.3 per cent to women; and 56.1 per cent to low-income and working-class persons with disabilities.

45. Additionally, 43.9, 47.4, 46.5, 47.4 and 53.5 per cent, respectively, responded that services were provided to all geographical areas, to all socio-economic segments, to all races and ethnicities, to all religious denominations, and for all types of disabilities. By comparison, 24.6 per cent responded that there were no support or assistive services, or technological devices of any kind, in their countries.

Rule 5
Accessibility

46. Respondents were asked whether Governments recognized the importance of accessibility in the process of the equalization of opportunities in all spheres of society, through programmes to make the physical environment accessible and measures to provide access to information and communication.

47. The survey revealed that 56.1 per cent of the responding countries have adopted policies, 52.6 per cent have passed legislation, 43.0 per cent have introduced programmes and 42.1 per cent have allocated financial resources to make the physical environment accessible.

48. In addition, 36.0 per cent have civil engineers and architects who are trained in access issues; 54.4 per cent have worked to increase access awareness; 41.2 per cent have implemented accessibility programmes; and 62.3 per cent have involved organizations of persons with disabilities in the planning and implementing of access measures. Some 17.5 per cent of countries have no measures relating to accessibility.

49. On the question of access to public buildings and institutions, 56.1 per cent said that provisions were made for access to schools and hospitals, community, medical and rehabilitation centres, clinics, public libraries, theatres and recreational centres; 57.0 per cent indicated that accessibility measures included all public buildings and government offices; 45.6 per cent stated that accessibility extended to the outdoor physical environment such as sidewalks, car parks and pedestrian streets; 36.8 per cent said that transportation facilities (land, rail, air and sea) were accessible; and 31.6 per cent indicated that no provisions for access were available in their countries.

50. Concerning information, the survey revealed that it is available in an accessible form to persons with disabilities in 36.0 per cent of the responding countries; to their families in 35.1 per cent; to disabled persons' organizations in 44.7 per cent; and to society at large in 50.0 per cent. Some 30.7 per cent of respondents said that accessible information was not available to any segment or in any form.

51. Concerning the measures taken by Governments to ensure the accessibility of information to persons with disabilities, the results showed that 45.6 per cent have adopted policies; 35.1 per cent have passed legislation; 46.5 per cent have introduced programmes; and 46.5 per cent have allocated financial resources.

52. Moreover, 36.0 per cent have trained interpreters; 47.4 per cent have increased awareness of accessibility with regard to information; 37.7 per cent carry out accessibility programmes; and 54.4 per cent consult disabled persons' organizations. Some 21.1 per cent of respondents have not adopted any of the measures indicated above.

53. In terms of the inclusiveness of accessibility measures, 60.5 per cent indicated that information was accessible to blind and visually impaired persons; 48.2 per cent to deaf/blind persons; and 54.4 per cent to deaf and hearing impaired persons. Accessible information is available to persons with developmental disabilities in 40.4 per cent and to persons with psychosocial disabilities in 33.3 per cent of responding countries.

54. On the question of the nature and format of accessible information, the survey revealed that 69.3 per cent provide reading materials in Braille; 62.3 per cent provide reading materials in audio format; 29.8 per cent provide news magazines in both Braille and audio format; 64.0 per cent have information available in sign language; and 21.1 per cent have reading material available for persons with developmental disabilities. By comparison, 18.4 per cent of respondents indicated that there were no accessible materials in any form in their countries.

Rule 6
Education

55. Respondents were asked whether Governments recognized the principle of equal primary, secondary and tertiary educational opportunities in integrated settings and took measures to ensure that equal opportunity was an integral part of the educational system.

56. With respect to the measures taken by Governments to achieve the inclusion of persons with disabilities in mainstream education, the survey revealed that 65.8 per cent have adopted policies; 55.3 per cent have passed legislation; 69.3 per cent have adopted inclusion programmes; and 68.4 per cent have allocated financial resources. Furthermore, 61.4 per cent of responding countries have taken measures to rehabilitate the school environment to meet the needs of children with disabilities; 73.7 per cent have trained teachers and school administrators to deal with the needs of children with disabilities; and 60.5 per cent have provided schools with educational materials, equipment and facilities for the use of children with disabilities.

57. Disabled persons' organizations are involved in the planning and execution of inclusion measures in 58.8 per cent of the countries. In 7.9 per cent of responding countries, none of the inclusion measures mentioned above have been taken.

58. Concerning the provision of education to persons with disabilities, 87.7 per cent of the responding countries provide education to children with disabilities; 67.5 per cent to women with disabilities; 67.5 per cent to low-income and working-class persons with disabilities; 65.8 per cent to persons with disabilities from all races and ethnicities; 68.4 per cent to people of all religious denominations; 58.8 per cent to all communities (urban, rural, agricultural, tribal, indigenous, migrant, refugee and illegal aliens); and 60.5 per cent to people with all types of disabilities.

59. In terms of the methods, means and techniques used to deliver education to persons with disabilities, 69.3 per cent of the countries employ sign language interpreters; 79.8 per cent use educational materials in Braille; 59.6 per cent use audio format; 67.5 per cent use appropriate materials for persons with intellectual disabilities; and 63.0 per cent use educational programmes specific to children who are unable to be integrated into the mainstream educational system.

60. Eleven per cent of the countries surveyed indicated that they had no specific programmes or plans for the inclusion of children with disabilities into education, and did not use any of the methods, means and techniques mentioned above.

Rule 7
Employment

61. The survey asked about Government recognition of the principle that persons with disabilities must be empowered to exercise their human rights, particularly in the field of employment, and must have equal opportunities for productive and gainful employment in the labour market.

62. The responses revealed that 59.6 per cent of countries have adopted policies, 61.4 per cent have passed legislation, 57.0 per cent have adopted programmes and 55.3 per cent have allocated financial resources for this purpose; 66.7 per cent have trained persons with disabilities to help them find employment; and 39.5 per cent

rehabilitate and restructure the physical, administrative, social and work environment to accommodate persons with disabilities in the workplace.

63. Responses also showed that 56.1 per cent raise awareness among relevant administrations and managers about issues affecting persons with disabilities in the workplace, 27.2 per cent provide accessible transportation to and from work and 48.0 per cent consult disabled persons' organizations about issues of disability and the workplace, while 14.9 per cent have no measures relating to the employment of persons with disabilities.

64. Regarding equal opportunities for employment, in 44.7 per cent of the countries persons with disabilities have equal prospects of being hired; in 50.0 per cent they have equal prospects for promotion; in 56.1 per cent they have equal access to work benefits; in 54.4 per cent they have equal prospects for raises and pay increases; and in 55.3 per cent they have equal access to training programmes.

Rule 8
Income maintenance and social security

65. Respondents were asked whether Governments fulfilled their responsibility to provide social security and income maintenance for persons with disabilities.

66. Of those countries that responded to the survey, 49.1 per cent have adopted policies, 50 per cent have passed legislation and 54.4 per cent have allocated financial resources for that purpose, 45.6 per cent provide persons with disabilities with information regarding social security and income maintenance and 46.5 per cent consult with disabled persons' organizations, while 27.2 per cent have no such provisions.

67. The survey revealed that those who suffer income cuts due to temporary disability receive income support in 50.9 per cent of the countries, while those whose disability is due to on-the-job injuries or accidents enjoy income support in 29.8 per cent.

68. Income support is provided to individuals with physical disabilities, sensory disabilities, intellectual disabilities and psychosocial disabilities by 58.8, 51.8, 56.1, and 44.7 per cent, respectively, of the countries that responded. Women with disabilities receive income support in 55.3 per cent of responding countries, and the parents of children with disabilities in 43 per cent.

69. In 37.7 per cent of countries, income support is provided to the caretakers of persons with disabilities. It is provided to all persons with disabilities regardless of their social, economic, religious, ethnic or racial background in 46.5 per cent of countries. There is no income support for any of the above-mentioned segments of the population in 21.1 per cent of responding countries.

Rule 9
Family life and personal integrity

70. Respondents were asked whether Governments promoted the right of persons with disabilities to personal integrity and ensured that laws did not discriminate against them with respect to family life, sexual relationships, marriage and parenthood.

71. Results revealed that 39.5 per cent of countries have adopted policies, and 40.4 per cent have passed legislation, 36.0 per cent have allocated financial resources and 43.0 per cent have raised public awareness with regard to the right to family life including parental rights for persons with disabilities, and 41.2 per cent have raised awareness among persons with disabilities themselves.

72. Monitoring and follow-up mechanisms to identify infringements of the rights of persons with disabilities have been set up in 31.6 per cent of the countries that responded, and 51.8 per cent consult disabled persons' organizations.

73. With respect to the full enjoyment of those rights, 75.4 per cent reported participation in family life, 74.4 per cent reported enjoyment of sexual rights, 81.6 per cent reported enjoyment of marital rights, 79.8 per cent reported enjoyment of parental rights, 74.6 per cent reported enjoyment of the right to privacy and 66.7 per cent reported access to guidance and counselling for persons with disabilities. No such rights exist for persons with disabilities in 12.3 per cent of responding countries.

Rule 10
Culture

74. Respondents were asked whether Governments ensured that persons with disabilities were integrated into cultural activities and could participate on an equal basis.

75. The results showed that 41.2 per cent have adopted policies to ensure the full inclusion of persons with disabilities in cultural life, 33.3 per cent have passed legislation, 41.2 per cent have adopted programmes and 45.6 per cent have allocated financial resources.

76. Of the countries that responded, 48.2 per cent have raised public awareness of the cultural rights of persons with disabilities, while 50.0 per cent have raised awareness of those rights among persons with disabilities themselves. Some 49.1 per cent of responding countries provide persons with disabilities with accessible spaces to enable them to participate in cultural life, while 36.0 per cent provide them with accessible information about cultural activities.

77. Moreover, 38.6 per cent of countries have made cultural activities accessible to persons with disabilities and 60.5 per cent have consulted disabled persons organizations regarding measures and procedures to be taken to make cultural activities fully accessible to persons with disabilities.

78. The percentage of countries that have not taken steps to ensure participation in and access to cultural life by persons with disabilities stands at 26.3 per cent.

Rule 11
Recreation and sports

79. Respondents were asked about measures taken by the State to ensure that persons with disabilities have equal opportunities to participate in recreation and sports.

80. Country responses ranged as follows: 50.9 per cent have adopted policies to ensure the right of persons with disabilities to participate in sports and recreational activities; 36.8 per cent have passed legislation; 60.5 per cent have allocated

financial resources; 55.3 per cent have raised public awareness; and 53.5 per cent have raised awareness of those rights among persons with disabilities themselves.

81. Accessible venues and spaces to practise and participate in sports, accessible information regarding sports and recreational activities and accessible sporting activities were reported by 52.5, 49.6 and 64.6 per cent of the countries, respectively. In 14.2 per cent of the countries, no measures have been taken to ensure the participation of persons with disabilities in sports and recreational activities.

82. In terms of the level of participation of persons with disabilities, 59.3 per cent of countries reported participation at the community level, 70.8 per cent reported participation at the national level and 68.1 per cent reported participation at the international level.

83. Among those countries that responded, 47.8 per cent reported persons with disabilities participating as amateur athletes while 24.8 per cent reported them participating as professional athletes. Some 19.5 per cent reported that no opportunities for persons with disabilities to participate in athletics and recreational sports were available at any of the levels mentioned above.

84. Asked about the accessibility of sports, recreational and athletic venues, 54.9 per cent of the respondents said that they were accessible.

Rule 12
Religion

85. Respondents were asked about the measures taken by Governments to encourage equal participation of persons with disabilities in the religious life of their communities.

86. The survey revealed that 30.1 per cent have adopted policies, 23.9 per cent have passed legislation, 23.0 per cent have adopted programmes and 23.0 per cent have allocated financial resources for that purpose; 32.7 per cent have raised public awareness of the religious rights of persons with disabilities; and 28.3 per cent have raised awareness of those rights among persons with disabilities themselves.

87. With respect to the accessibility of places of worship and religious events, 29.2 per cent of the countries stated that they were accessible; 35.4 per cent provided accessible information regarding religious services and events; and 35.4 per cent ensured that religious services and events were accessible to persons with disabilities.

88. On the question of accessibility to religious services for all persons with disabilities, 54.9 per cent responded positively.

Rule 13
Information and research

89. Respondents were asked whether Governments collected and disseminated information on the living conditions of persons with disabilities and promoted comprehensive research on all aspects, including obstacles that affect the lives of persons with disabilities.

90. Results indicate that 42.5 per cent of countries have adopted policies on this matter, 27.4 per cent have passed legislation, 41.6 per cent have adopted programmes and 42.5 per cent have allocated financial resources.

91. In addition, 44.2 per cent of Governments have programmes to raise awareness of the need for statistics and information; 69.0 per cent collect data and information; 60.2 per cent collaborate with disabled persons' organizations; 46.0 per cent disseminate statistics and information to users and researchers; and 45.1 per cent update their statistics periodically. Only 17.7 per cent of countries have no programmes for collecting and disseminating statistics and conducting research into disability issues.

92. Asked about the existence of systems for collecting, processing, analysing and publishing data about disability, 55.8 per cent responded positively while 44.2 per cent said that they had no such system.

93. On the areas covered by disability statistics, 58.4 per cent have statistics dealing with the prevalence and incidence of disability; 72.6 per cent have statistics on the types of disabilities; and 55.8 per cent have statistics broken down by gender, age, background, social and economic situation and geographical location. In 47.8 per cent of countries, statistics cover the needs of persons with disabilities; in 53.1 per cent they deal with the programmes and services provided to persons with disabilities; and in 42.5 per cent they include the availability, scope and coverage of services.

94. Standard of living statistics for persons with disabilities are available in 52.2 per cent of the countries. In 58.4 per cent of the countries, statistics cover the educational levels of persons with disabilities; in 29.2 per cent they cover employment; and in 24.1 per cent there are statistics on the expense incurred by having a disability.

95. Some 20.4 per cent of countries have statistics about the effect of social policies on persons with disabilities; 16.8 per cent monitor the type of research being undertaken and the parties conducting it; and 41.6 per cent collect data on disabled persons' organizations, their programmes, services and coverage.

Rule 16
Economic policies

96. Respondents were asked what economic policies Governments have adopted to create equal opportunities for persons with disabilities.

97. Of the countries that responded, 43.4 per cent have adopted economic policies specific to persons with disabilities; 40.7 per cent have passed legislation; 62.8 per cent offer financial support to projects relevant to persons with disabilities; and 49.9 per cent have created a fund to support grass-roots projects and programmes for persons with disabilities. Additionally, 43.4 per cent have involved disabled persons' organizations in financial planning while 18.6 per cent have not taken any financial measures.

Rule 17
Coordination of work

98. Respondents were asked what actions Governments had taken to establish and strengthen national coordinating bodies on disability.

99. The survey found that 61.9 per cent of countries have established permanent coordination committees; 49.6 per cent have bestowed a legal status on those committees; 45.1 per cent have allocated budgets to them; 66.4 per cent have included organizations of persons with disabilities in the committees; and 46.0 per cent require gender balance and representation of all types of disabilities in the committees. By comparison, 16.8 per cent of responding countries have not taken steps to implement Rule 17.

100. With respect to the effect that these measures have had on the actual situation, 69.0 per cent said that their committees had representation by persons with disabilities; 60.2 per cent said that their committees had legal status; 51.3 per cent said that all types of disabilities were represented on their committees; and 34.5 per cent said that their committees' membership was gender-balanced. Finally, 32.7 per cent said that their committees received adequate funding.

Rule 18
Organizations of persons with disabilities

101. Respondents were asked what actions Governments had taken to ensure and encourage the formation and participation of organizations to represent persons with disabilities at the local, regional and national level.

102. Initial analysis of responses shows that 45.1 per cent of countries have adopted policies to encourage the formation and participation of disabled persons' organizations; 45.1 per cent have passed legislation; and 46.0 per cent have launched programmes to empower and support disabled persons' organizations. In addition, 35.4 per cent have set administrative guidelines; 55.8 per cent have allocated financial resources; and 44.2 per cent have granted consultative status with the Government to disabled persons' organizations.

103. Of the countries that responded, 61.9 per cent collaborate with disabled persons' organizations on all matters relating to persons with disabilities and 55.8 per cent have given them legal and representational status, while 11.5 per cent of countries have yet to adopt any measures.

104. Regarding the role that disabled persons' organizations play, the survey revealed that in 67.3 per cent of countries they offer advice and guidance on policies; in 77.0 per cent they identify priorities; in 62.8 per cent they collaborate in planning; in 54.0 per cent they collaborate in monitoring and evaluation; and in 77.0 per cent they are actively involved in all awareness-raising efforts. Disabled persons' organizations play no significant role in a small number of countries, 6.2 per cent.

Rule 19
Personnel training

105. Respondents were asked to what extent Governments ensure adequate training of personnel involved in the planning and provision of programmes and services concerning persons with disabilities.

106. The survey found that 39.8 per cent of countries have adopted policies on personnel training; 24.8 per cent have passed legislation; 54.9 per cent have adopted training programmes; 39.8 per cent have set professional standards for personnel; 46.9 per cent have allocated financial resources for the training of personnel; 46.0 per cent have engaged in capacity-building of personnel; and 46.0 per cent involve disabled persons' organizations in their training; while 22.1 per cent have not taken any measures with respect to training.

Rule 20
National monitoring and evaluation of disability programmes in the implementation of the Rules

107. In relation to the continuous monitoring and evaluation of the implementation of national programmes and services concerning the equalization of opportunities for persons with disabilities, the survey had the following results.

108. Of the countries that responded, 46.9 per cent have adopted an official definition of disability; 39.9 per cent have established a national monitoring body; and 47.8 per cent have worked on collecting data on disability. In addition, 47.8 per cent have conducted a national census; 23.9 per cent have established a national registry; 47.8 per cent have used data collected by public institutions and service providers; and 47.8 per cent have used data collected by disabled persons' organizations. By comparison, 18.6 per cent have not taken any of the above measures to monitor equalization of opportunities.

109. As for the scope of the monitoring and evaluation mechanisms, 43.4 per cent of responding countries said that they covered the size and prevalence of disability; 54.9 per cent that they covered types of disabilities; 48.7 per cent that they covered age distribution; 46.0 per cent that they covered disability according to gender; and 44.2 per cent that they covered disability according to geographical location. Additionally, 38.1 per cent reported that their monitoring activities included disabled persons' organizations; 38.1 per cent included service provision organizations; 33.6 per cent included service providers; and 24.8 per cent included others.

110. With regard to the use of information from monitoring activities, 55.8 per cent reported using it to formulate policy; 51.3 per cent to amend and improve services; and 49.6 per cent to review and restructure programmes. Information is published and disseminated in 36.3 per cent of countries, while in 47.8 per cent it is used in awareness-raising and education. Furthermore, 47.8 per cent use information from monitoring activities in annual and periodical reports at the national level; 37.2 per cent in research; and 4.4 per cent for other purposes.

Rule 21
Technical and economic cooperation

111. When asked about measures to improve living conditions of persons with disabilities in developing countries through technical and economic cooperation, 68.1 per cent of the responding countries said that they were signatories to international agreements and treaties; 51.3 per cent that they were party to bilateral and multilateral cooperation agreements; and 61.9 per cent that they were either donors or recipients of financial aid.

112. Furthermore, 67.3 per cent referred to cooperation in the context of exchanging information, best practices and the transfer of knowledge; 51.3 per cent referred to technological exchanges; 56.6 per cent reported participating in international development programmes; and 67.3 per cent reported taking part in regional and international initiatives. The proportion of countries that did not take any measures in this area was 13.3 per cent.

Minorities, refugees and other marginalized groups

113. The survey incorporated specific questions concerning minorities, refugees and other marginalized segments of society.

114. Of the countries that responded, 33.9 per cent include these groups in their measures, policies, programmes and services; 21.4 per cent have adopted programmes specific to the needs of persons with disabilities from these groups; and 25.9 per cent assist the families of persons with disabilities from these groups.

115. With respect to services, 39.3 per cent reported taking measures to ensure that services are accessible to these groups and 25.0 per cent said that persons with disabilities belonging to these groups, and their families, were represented in disabled persons' organizations.

116. Additionally, 41.1 per cent of respondents said they took measures to ensure that members of these groups had access to education; 24.1 per cent said that they provided access to employment; and 27.7 per cent that they provided appropriate housing.

117. Protection for women and children is provided in 23.2 per cent of countries, and 23.2 per cent allocate financial resources to the issues and concerns of marginalized groups. No measures have been taken in 37.8 per cent of countries.

F. Conclusions regarding the survey

118. The results of this survey represent a wealth of information that requires a great deal of further analysis and explication. I wanted to share these preliminary results. I will be working, along with the team that supports me, the members of the Panel of Experts and interested stakeholders, on analysing and explicating these results to build on and enrich existing data.

119. During the coming months, countries that have not responded will be urged to do so. Priorities for the next phase of work will be set in accordance with the information gleaned from the survey.

120. Efforts will be renewed to involve United Nations agencies dealing with health, education, employment, empowerment of women, population, social development, child rights and human rights.

III. Activities and achievements

121. In addition to the survey, the past year included activities at all levels to monitor and further the implementation of the Standard Rules for the Equalization of Opportunities for Persons with Disabilities.

A. Awareness-raising

122. A parliamentary process was launched to raise awareness and build capacity among parliamentarians and legislators in the Arab region. The current year saw the convening of two of the 14 symposiums to be held over the next three years. The first symposium was held in Amman in March 2005;[8] the second will be held in Beirut in December.

123. A child-to-child awareness-raising programme was developed for use with schoolchildren, and educational authorities were encouraged to implement it.

124. In my capacity as Special Rapporteur, I participated actively in conferences, symposiums, workshops, meetings and international and regional initiatives relating to the rights and equal opportunities of persons with disabilities.[9]

B. Advocacy

125. Reinforced by objective monitoring, advocacy can be a most effective tool to encourage Governments, policymakers and decision makers to adopt the vision of equalizing opportunities for persons with disabilities.

126. Advocacy is the main purpose for regional consultations and country visits, in which the Special Rapporteur meets with Government officials at the highest levels and with representatives of international development organizations and disabled persons' organizations. Efforts in this domain in 2005 were as follows.

127. The Special Rapporteur held a meeting with the President of the General Assembly to discuss the inclusion of disability issues in the final document of the 2005 World Summit held in September. The General Assembly included disability in paragraphs 129 and 142 of the document (resolution 60/1). This result could not have been achieved without the cooperation of the permanent representatives, heads of regional delegations and disabled persons' organizations who supported the effort.

128. A statement presented to the Commission on Human Rights in April called on the Commission to give disability issues a higher priority and to allow more time for discussing them during its meetings. The statement also called on United Nations monitoring bodies to include disability in their monitoring activities, paying particular attention to the issues of women and children in their review of country reports.

129. In a meeting with the Government of Tunisia, the Special Rapporteur suggested that accessibility issues be taken into consideration during the refurbishment and restoration of vacation spots in coastal regions, and that those regions be marketed as destinations for persons with disabilities.

130. In a meeting with the Ministry of Finance in Guinea, the Special Rapporteur suggested that the Government could translate its political commitment to persons with disabilities into reality by allocating appropriate funds.

131. In a meeting with the Minister for Foreign Affairs of Finland, it was suggested that Finland, along with other Nordic countries and in cooperation with the World Federation of the Deaf, could lend financial, technical and technological support to assist other regions in the formulation and development of policies, programmes and services for deaf persons. A concept paper and proposal are being prepared for this purpose.

132. The work of the United Nations development agencies and funds has been a concern for the Special Rapporteur since the beginning of her mandate. Measures are being taken, through dialogue and inclusion in activities and programmes, to place disability among the priority areas of organizations dealing with women's issues, children's rights, population, health, education and nutrition.

133. A questionnaire was designed and sent to the regional representatives of each organization asking them about their mandate, programmes, projects and activities as they relate to persons with disabilities, and the percentage of budgetary allocation that goes towards issues of disability. A few responded, but most declined, stating that those issues were not part of their mandate.

134. During the year, meetings were held with the regional directors and executive secretaries of the United Nations Population Fund, the United Nations Educational, Scientific and Cultural Organization, the United Nations Children's Fund and the United Nations Development Fund for Women, and a number of officials from the United Nations Development Programme.

C. Country visits and regional consultations

135. In many developing countries the Government is the major, if not the sole, actor when it comes to setting policies, enacting legislation and delivering programmes. Owing to the weakness of advocacy efforts by civil society in some countries and the lack of sufficient resources, issues relating to disabilities have often been pushed to the bottom of the list of Government priorities.

136. In the last 12 months, I conducted several country visits. Some were in response to invitations from Governments or disabled persons' organizations, while others were initiated on the basis of information and research or were based on the need to speed up, support or push forward certain initiatives or programmes.

137. The aim of country visits and regional consultations has always been to open the channels of communication with Governments regarding the implementation of the Standard Rules, and to encourage dialogue between disabled persons' organizations and their Governments. Other activities include conducting, monitoring and assessing activities and witnessing first-hand the effect of such implementation or lack thereof.

138. Country visits for 2005 included Northern and Western Africa (Morocco, Tunisia, Guinea), Northern Europe (Sweden and Finland) and Southern and Eastern Africa (United Republic of Tanzania and South Africa).

139. During these visits, meetings were held with (a) Government representatives including ministers, deputy ministers and parliamentarians; (b) disabled persons' organizations and federations; (c) development organizations; (d) rehabilitation centres, schools for children with disabilities and health institutions and centres; (e) programmes of particular significance (e.g. Finnish school for severely disabled children preparing to join mainstream education); and (f) media representatives.

140. The focus of the visits was (a) to assess the implementation of the Standard Rules and monitoring of the areas of strength and weakness; (b) to listen to issues raised by disabled persons' organizations and discuss those concerns with relevant Government officials; (c) to observe country experiences and characteristics in dealing with issues of disability; and (d) to share successful experiences and good practices wherever possible.

IV. The Panel of Experts

141. As the Special Rapporteur on Disability, I would not be able to fulfil the responsibilities entrusted to me by the Commission on Social Development without the help, cooperation, advice and counsel of organizations of persons with disabilities and the Panel of Experts representing those organizations.

142. Two meetings of the Panel of Experts were held in 2005. The first was convened in Amman in March 2005 in conjunction with the Arab Parliamentary Symposium on Legislating Disability Issues in the Arab World, where members of the Panel shared their country experiences with legislating on disability. The second was held in New York in August 2005 in conjunction with the sixth session of the Ad Hoc Committee on the Rights and Dignity of Persons with Disabilities.

143. Panel members made suggestions on the draft of my statement to the Commission on Human Rights and encouraged their country ambassadors to support the inclusion of disability in the 2005 World Summit Outcome.

144. The support of the Panel, and the regular communication between its members and me have been instrumental to the successes of the past year.

V. Conclusions

145. **My previous report included a number of challenges and recommendations to Governments and disabled persons' organizations. During the past year, most of the activities concentrated on trying to meet these challenges and to urge Governments, relevant organizations and other stakeholders to respond to the recommendations.**

146. **The task is not an easy one and the challenges are many. Only through a collaborative effort can we hope to create a world that will accept each of us with our diverse abilities, our weaknesses and strengths, and to exercise that diversity in creating such a world.**

147. **All of the achievements to date in this domain constitute only a small dent in the huge task that needs to be accomplished. Making true progress towards an enabling world requires the combined efforts of all at every level — international, regional, national, communal and familial.**

148. **Finally, I would like to say that despite the commitment shown by Member States to the promotion and protection of the rights and dignity of persons with disabilities and to the equalization of opportunities for full participation, most have not matched their political commitment with a financial one.**

149. **I invite and encourage all Member States to make contributions to the United Nations Voluntary Fund for Disability in order to continue the valuable work of promoting and advancing the equalization of opportunities for persons with disabilities.**

Notes

[1] At the practical level, it was necessary to review previous surveys and studies to identify their issues, scope, design, management and the results obtained in order to build on their successes and to learn from the problems they faced. It was also necessary to identify the content of the questions and construct an instrument that validates and assesses the relevance of the responses. At the logistical level, it was necessary to identify the target groups, their locations and the means by which to communicate with them, and the time frame in which to do so.

[2] Identifying addresses and locations of target groups; translating the questionnaire into several languages along with the guideline for filling out and returning the questionnaire; obtaining postage-paid envelopes for the questionnaires sent to disabled persons' organizations; encouraging Governments to hold seminars with their local organization to discuss the content of the questionnaire and cooperate in filling it out; and finding and allocating the financial resources needed to conduct such a survey. The questionnaire was translated into French, Spanish and Arabic to remove any language barriers and allow for a smoother interaction with the content of the questionnaire.

[3] There was a total of 408 procedures and conditions which, taken together, would constitute the ideal level of adherence to the spirit, letter and philosophy of the equalization of opportunities and the Standard Rules. The questions were clearly worded and followed the order of the Standard Rules themselves, beginning with questions relating to the preconditions, then the target areas, and finally the implementation measures. Each question pertained to a Rule, and beneath each Rule was a checklist pertaining to the implementation measures.

[4] Two responses were obtained from Hong Kong and Palestine.

[5] This could be due to the length of the questionnaire (23 pages), or the number (47) and diversity of the questions. Another United Nations body had sent out its questionnaire on disability just prior to the Special Rapporteur's, which may have caused some confusion.

[6] Responses were received from each region as follows:

- Africa: 23 countries, or 53 per cent of the countries in the region
- Asia: 21 countries, or 43 per cent of the countries in the region
- Europe: 30 countries, or 65 per cent of the countries in the region
- Latin America: 21 countries, or 64 per cent of the countries in the region
- Arab States: 19 countries, or 86 per cent of the countries in the region.

[r] A contributing factor could be the growing awareness in the region of disability issues, generated by the adoption of an Arab Decade for Persons with Disabilities in May 2004 and the establishment of a Parliamentary Committee on Disability within the Union of Arab Parliaments together with the accompanying awareness-raising efforts. It is possible to speculate that translating the questionnaire into Arabic and having a Special Rapporteur from the region may also have contributed.

[s] Participants included parliamentarians from the Council of Europe and the German and South African parliaments as well as representatives of international disability federations. The symposium was instrumental in launching an inter- and intraregional, as well as intercultural dialogue on the equalization of opportunities, together with a dialogue between persons with disabilities and members of Arab parliaments. A number of parliamentary entities in other regions have expressed interest in having the same process and I am hoping that this process will expand to include parliaments in Africa, Asia and Latin America.

[t] Activities this year included:

(a) Inclusion International conference on poverty and intellectual disability in Europe, October 2005, contributed a paper on the same theme;

(b) Rehabilitation International conference on disability rights in a changing world, Manama, November 2005; presented a paper entitled "Disability rights as human rights: Focus on Women with Disabilities";

(c) Regional workshop on empowering women with disabilities, Manama, November 2005, participated in designing and planning the workshop;

(d) Gladnet regional workshop on people with disabilities in the labour market, Manama, November 2005; presented a paper entitled "The right to work for persons with disabilities";

(e) International conference of the World Federation of the Deaf, "Our Rights-Our Future", Helsinki, September 2005; presented a paper entitled "Disability rights in the context of human rights instruments";

(f) Meeting with the Swedish consortium of disabled persons' organizations in the context of a country visit to Sweden initiated by that group, September 2005;

(g) International conference of the Global Forum for Health Research, "Forum 9: Poverty, Equity and Health Research", Mumbai, India, September 2005. My office contributed a presentation entitled "The right to health: lessons from the disability movement";

(h) International conference on sports for persons with intellectual disabilities, Damascus, September, 2005;

(i) UNESCO flagship meeting on indicators for inclusion in education, Paris, June 2005. My office contributed a presentation entitled "Ensuring inclusion in education for persons with disabilities";

(j) UNESCO meeting on education for all in the Arab States, Beirut, June 2005;

(k) United Nations regional consultative meeting on the international convention, Morocco, July 2005;

(l) Meeting with Tunisian disabled persons' organizations in the context of a country visit to Tunisia, July 2005;

(m) Meeting with Guinean disabled persons' organizations in the context of a country visit to Guinea, July 2005;

(n) International conference on urban youth and children in the Middle East and North Africa; participated in the World Bank-sponsored parallel sessions on children and youth with disabilities, Dubai, May 2005;

(o) Regional conference on diagnosing, measuring and responding to autism, Dubai, March 2005.

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Future organization and methods of work of the Commission for Social Development

Note by the Secretariat

Summary

The present note is prepared pursuant to General Assembly resolution 57/270 B, in which each functional commission was requested to examine its methods of work, and to Economic and Social Council resolution 2005/11, in which the Council decided that the Commission for Social Development at its forty-fourth session should consider further its methods of work, including, inter alia, the choice of themes for the 2007-2008 cycle. The note presents some background on the review of the methods of work of the Commission, an overview of the modalities of the review and policy sessions, and a proposal for the 2007-2008 substantive theme.

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Background

1. The General Assembly, in its resolution 57/270 B, requested each functional commission to examine its methods of work in order to better pursue the implementation of the outcomes of the major United Nations conferences and summits. In the same resolution, the Secretary-General was requested to submit a report with recommendations to each functional commission; the commissions were then requested to report to the Council no later than 2005 on the outcome of that examination.

2. At its forty-second and forty-third sessions, the Commission for Social Development considered the reports of the Secretary-General (E/CN.5/2004/2 and E/CN.5/2005/2 respectively) on its methods of work. In that context, the Economic and Social Council adopted resolution 2005/11 on the future organization and methods of work of the Commission for Social Development, whereby the Commission would be organized in a series of two-year action-oriented implementation cycles that would include a review segment and a policy segment. That approach follows the work cycle of the Commission on Sustainable Development, which implemented the two-year cycle for its 2004-2005 sessions. The Council also decided that the Commission for Social Development should include in its work a consideration of the nature of its outcomes, the inclusion of emerging issues within its programme of work and the choice of themes for the 2007-2008 cycle.

3. In February 2005, at the forty-third session of the Commission, which commemorated the tenth anniversary of the World Summit for Social Development, delegations reaffirmed the primary role of the Commission in follow-up to the Summit and stressed that the outcome of the Commission should have an impact at all levels. In that regard, careful consideration of the role of the Commission was emphasized to ensure its impact and effectiveness, particularly in relation to more action-oriented strategies for national policymakers.

4. Delegations further agreed that more interactive dialogues would enhance the work of the Commission, and that participation continued to be important for all stakeholders, including United Nations funds and agencies, regional commissions, non-governmental organizations and the private sector. In its consideration of the biennial programme of work of the Commission, a number of delegations also expressed the view that a review and policy session would allow for more time to reflect on substantive issues.

Modalities of the review and policy sessions

5. In order to fulfil its mandate, the Commission, beginning with its forty-fifth session in 2007, will organize the first part of its work in a series of two-year action-oriented implementation cycles. In that context, the Council, in its resolution 2005/11, further decided that the Commission should strengthen the connection between its review of implementation and its policy recommendations and that it should emphasize increased exchange of national, regional and international experiences, as well as focused and interactive dialogues among experts and practitioners and the sharing of best practices and lessons learned.

6. The second part of the work of the Commission will continue to be devoted to its review of plans and programmes of action pertaining to the situation of social groups, taking into account also the chosen theme of the review and policy sessions.

A. The review session

7. The first year of the cycle — the review session — will focus on a review of progress or regress in the implementation of the Copenhagen Declaration and Programme of Action. The first part will be devoted to interactive round tables and panel discussions on the chosen theme, which will be elaborated in a report of the Secretary-General prepared for the review session. The session will include an exchange of regional experiences, dialogues with experts and practitioners, the sharing of best practices and lessons learned in the implementation of the outcomes of the World Summit on Social Development and their linkages with the Millennium Development Goals. Participants would be drawn from Governments, academia, civil society and the private sector.

8. The outcome of the review session will be a non-negotiated document in the form of a chairperson's summary. It will identify constraints, obstacles, best practices and possible approaches and will reflect overall progress or regress in the implementation of the outcome of the Summit.

B. The policy session

9. The second year — the policy session — will focus on decisions on how to overcome constraints, obstacles and barriers to the implementation process. The first part will be devoted to interactive round tables/panel discussions, followed by a high-level segment, involving ministers or their representatives. A report of the Secretary-General for the policy session will be prepared on the basis of the Chairman's summary of the review session, proposing policy recommendations.

10. The outcome of the policy session will be a negotiated document, which will identify policy options and practical measures intended to facilitate implementation of the Copenhagen commitments.

C. Future themes

11. It is proposed that each cycle of the Commission address, beginning in 2007 at the forty-fifth session, one of the three core issues of the World Summit for Social Development: eradicating poverty, promoting full employment and fostering social integration. In addition, it is hoped that the focus on a core issue of the Summit over a two-year cycle will enable the Commission to go into greater depth by also addressing related cross-cutting issues, emerging issues and linkages with other issues relevant to the theme under discussion. Such a focus should avoid the danger of relegating the other goals of the Programme of Action to the background.

12. **The priority theme for the forty-fourth session of the Commission for Social Development in 2006 is "Review of the first United Nations Decade for the eradication of poverty (1997-2006)" (see E/2005/26-E/CN.5/2005/7, para. 3). Furthermore, by its decision 2005/13, the Council decided that the theme for**

the high-level segment of its 2006 substantive session would be "Creating an environment at the national and international levels conducive to generating full and productive employment and decent work for all, and its impact on sustainable development". In view of the above, and taking into consideration the recommendation in the 2005 World Summit Outcome (see General Assembly resolution 60/1) to make the goals of full employment and decent work for all a central objective of national and international policies, it is felt that the Commission for Social Development would have an excellent opportunity to make a meaningful contribution to the Council on the subject of employment. It is therefore proposed that "Promoting full employment" be considered as the theme for the 2007-2008 cycle.